

Promoting European culture

SUMMARY

The concept of cultural diversity lies at the heart of the European project. Recent years have seen renewed interest in the sector's potential for promoting social cohesion, unity and tolerance, on the one hand, with continued recognition of its valuable economic role, on the other. There is a strong commitment at the EU level to ensure that culture is mainstreamed in all policy areas, with a special focus on the protection of cultural heritage and cultural diversity, which are key elements in cultural identity and expression. From the economic point of view, the cultural and creative sector, which employs 8.4 million people in the European Union, is dynamic and has a large potential for growth due to its diversity and scope for individual creative freedom. Yet the development of this potential is hampered by barriers, notably linguistic diversity, fragmentation and different financial mechanisms across the EU. The EU's cultural and creative industry also faces challenge from digital technologies and global competition, particularly from the United States' (US) audiovisual industry, and from US and Chinese diplomatic efforts to promote their cultural output.

Under the Treaty on the Functioning of the European Union, the EU's role in the context of cultural policy is a supportive and complementary one, direct responsibility in the area being largely a matter for the individual Member States. Nevertheless, since 2014, these challenges have been addressed at the EU level, inter alia via the strengthening of the digital single market, which is essential for access to culture, the circulation of European cultural works, the fair remuneration of creators and fair competition. Since the economic crisis, additional funding has also been made available for the sector via the European Fund for Strategic Investment introduced by the Juncker Commission in 2015. As indicated in a 2017 European Commission communication on the role of culture and education, the synergies between the socio-economic aspects are to be enhanced. The European Year of Cultural Heritage in 2018 is to feed into a reflection and actions related to shared culture and history. These issues are addressed in the New European Agenda for Culture, while the new multiannual financial framework for 2021-2027 envisages increased funding for culture. This will also support efforts to combine artistic and technological skills, which are a prerequisite for artistic expression in the new digital environment.

This is an update of an earlier briefing issued in advance of the 2019 European elections.



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State of play

Culture is a [broad concept](#). It is perceived as an element of identity which gives a sense of belonging, as a way of expressing values, but also as an economic activity, through the cultural and creative industries (CCI). In the context of [EU policy](#), it covers cultural heritage such as works of art (paintings, sculptures, architecture, archives, [cultural and heritage sites](#)); traditional performing arts, such as music, theatre, ballet or opera; traditions, contemporary art and creations, and CCI, which encompass a wide variety of sectors ranging from publishing, audiovisual media and video games to design and fashion.

Challenges

As has been the case with so many industries, the digital shift, or what is known as the 'fourth industrial revolution', has strongly impacted culture in its creative processes, business and 'consumption' models, and modes of access to cultural services and works. Traditional practices have been disrupted and the consequences have been particularly strongly felt in the music and audiovisual sectors. A 2014 [study](#) claims that in France, Germany, Italy, Spain and the UK – the top five markets – 200 000 jobs were lost and €20 billion worth in added value was destroyed between 2008 and 2011 in the core sectors due to digital piracy.

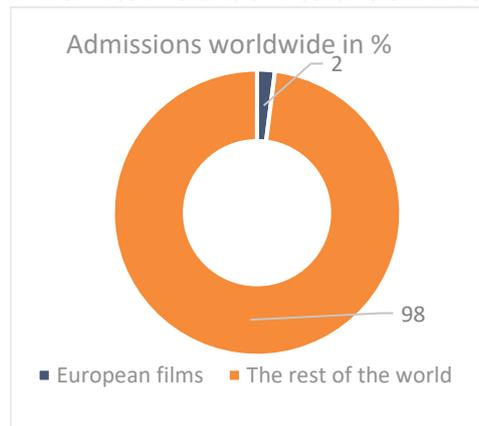
The audiovisual sector also faces competition from Hollywood productions, and the share of admission to EU films on the world market is very low. Very few European feature films make it to the top 10 or 20 on the EU [box office list](#). US films account for almost [two-thirds](#) of the EU film market, while EU productions, together with co-productions with the US, represent just one third. Moreover, the circulation of non-national EU films that are not co-productions is difficult. This is due, among other things, to linguistic barriers, which raise the costs of international distribution. Between [one-third](#) and a [half](#) of EU citizens do not speak a foreign language, and cannot follow non-national content, making translation and subtitling necessary for the successful circulation and distribution of cultural works. The most popular [foreign languages](#) taught in schools are English, French, German and Spanish, which are also among the most widely spoken [mother tongues](#). But there are 20 other official EU languages to consider.

Financing of cultural projects in general remains problematic since, in the EU, the sector relies predominantly on SMEs and their capacity to access funding. Obtaining funds for cultural activities depends on intangibles, such as copyright or intellectual property rights, as guarantees, and their value is difficult to assess. Only one in two cultural SMEs is successful in accessing financial support as compared to two thirds of SMEs active in other sectors.

Potential

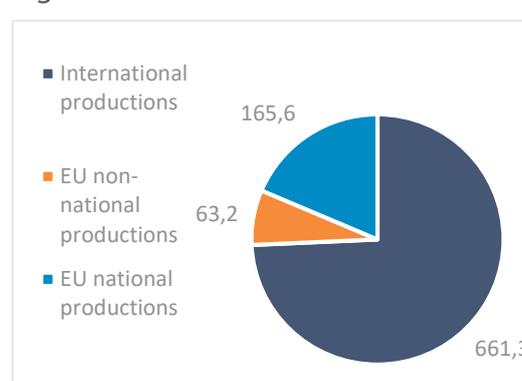
Despite these challenges, the sector resisted the 2008 crisis. According to [Eurostat culture statistics](#), overall [8.4 million people](#) (nearly 4 % of the total number employed) work directly in the cultural

Figure 1 - Market share of European films in terms of admissions % in 2016



Source: [The circulation of European films outside Europe](#), European Audiovisual Observatory, 2017.

Figure 2 - Cinema admissions in millions



Source: [The circulation of EU non-national films](#), European Audiovisual Observatory, 2017.

sector. Creative and performing artists, together with authors, journalists and linguists, account for 30 % of total employment in the sector, representing also the highest level of people with a university diploma or equivalent (58 %). The cultural heritage sector alone [directly employs](#) more than 300 000 people with 7.8 million occupying jobs in related sectors (tourism, building work, and services such as transport, interpretation or translation, and maintenance and security of cultural sites). The rate between direct jobs in the cultural heritage sector and indirect or induced jobs is [one to almost 27](#) compared to the 6:3 ratio for the car industry. This job potential is important in the context of Europeans' concerns about [unemployment](#).

Cultural attractiveness and cultural diplomacy as a tool in international relations and an instrument of soft power, help promote peaceful international relations and economic growth. Europe's cultural diversity, particularly its cultural heritage, is also beneficial for tourism. In a 2015 opinion poll, between 70 % and 80 % of respondents from Brazil, Canada, China, India, Japan, Mexico, South Korea, South Africa, the US (strategic partners) and Russia, found EU countries [attractive](#), particularly for their cultural heritage – museums and monuments – but also arts, luxury goods and clothes. The EU accounts for nearly half of [Unesco world heritage sites](#).

At the international level, the EU cooperates with the United Nations Educational, Scientific and Cultural Organization (Unesco). It is a party to the Unesco [2005 convention](#) on cultural diversity. The EU also cooperates with the Council of Europe (CoE) on [cultural routes](#) that cross the whole continent, with tourist paths following cultural heritage sites according to chosen themes. The EU and CoE also co-organise Europe-wide [Heritage Days](#), a highly popular annual event that allows more than [20 million Europeans](#) to visit sites that are often usually closed to the public.

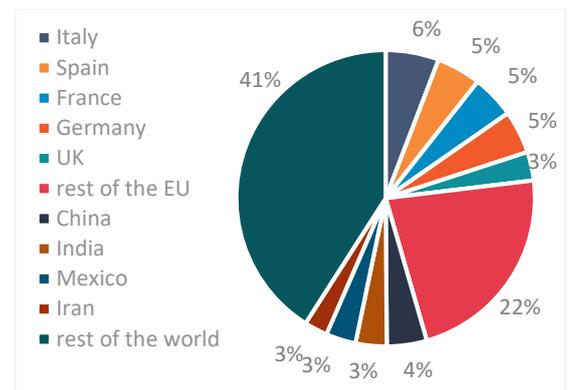
Despite these positive aspects and the cultural attractiveness of the EU, investment at the EU level in cultural diplomacy to promote European culture does not match the levels of the US and China. Efforts are nevertheless made; [EU film festivals abroad](#), for example, present a selection of films from different EU countries and thus enhance the knowledge of European cinematographic diversity as compared to festivals of national productions presented abroad.

EU framework

Legal framework

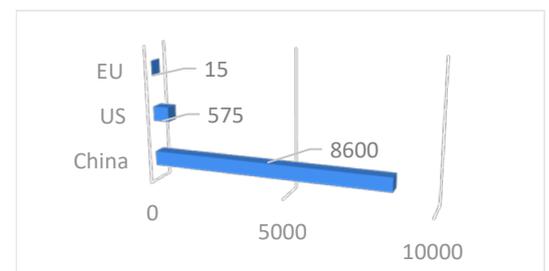
The EU has no legislative competence in this broad policy area. [Article 3\(3\)](#) of the Treaty on European Union (TEU) states that the Union shall 'ensure that Europe's cultural heritage is safeguarded and enhanced', and [Articles 6](#) and [167](#) of the Treaty on the Functioning of the European Union (TFEU) define its role as being to support (also financially), supplement and coordinate Member States' efforts in this field in order to preserve and respect the EU's cultural diversity as expressed in its motto 'United in diversity'. It also frames the role of the European Parliament as being to adopt incentive measures, together with the Council. Article 167(4) TFEU provides for cultural aspects to

Figure 3 - Unesco World Cultural Heritage Sites



Source: [Unesco](#), World Heritage List 2017.

Figure 4 - Investment in cultural diplomacy, 2014, in €million



Source: [European Commission](#), 2014, (EU data only for [European Neighbourhood countries](#)).

be taken into account across other policy areas under EU treaty provisions. As a sign of the recognition of the specificity of cultural heritage, state aid for cultural heritage conservation is declared to be compatible with internal market rules under [Article 107\(3d\)](#) TFEU, provided it does not affect trading and competition.

As far as the audiovisual sector is concerned, this is covered under [Article 173](#) TFEU on industry. It allows the EP and the Council to take measures to support individual countries' actions aimed at adjusting their industry to structural changes, encouraging initiatives, particularly by SMEs, as well as cooperation, and promoting better exploitation of industrial potential in innovation and research. Any harmonisation among national regulations or laws is excluded.

To cover this broad policy area, the EU, in its 2007 [European Agenda for Culture](#), defined its three strategic objectives as: cultural diversity and intercultural dialogue; culture as a catalyst for creativity (which is related to cultural and creative industries); and cultural diplomacy.

Financial framework

To realise these ambitions, 'the [Creative Europe programme](#)', under Heading 3 of the 2014-2020 EU Multiannual Financial Framework (security and citizenship), is the only funding source devoted solely to this broadly defined cultural sector. For the period [2014-2020](#) it has a total budget of €1 463 million (0.14 % of the total Multiannual Financial Framework in current prices). 31 % is earmarked for projects in the cultural strand, promoting the transnational mobility of artists and CCI operators, the circulation of their works and translation of European literature, European platforms presenting (emerging)

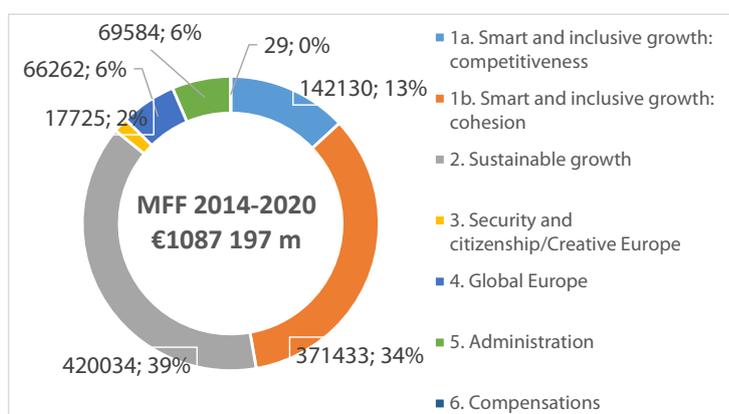
talents, etc. The strand also finances EU awards for contemporary architecture, literature, pop music, film projects with the best box-office potential, and cultural heritage. The funding of €1.5 million per city chosen as a [European Capital of Culture](#) seeks to trigger other investments for revitalisation projects concerning cultural heritage and cultural attractiveness. In 2016 Wroclaw attracted [€615 million](#), the biggest investment ever for a Capital of Culture.

56 % is earmarked for the media strand. This offers support for (international) co-productions of feature films, animated films, documentaries and their international circulation, video games development, on-line access, audience development, as well as for film festivals, cinema networks or training initiatives. Among other priorities, the remaining 13 %, devoted to the cross-sectoral strand, has covered a new instrument since 2016, in the form of a guarantee facility for SMEs active in the cultural and creative industry.

In line with Article 167(4) TFEU, cultural aspects are taken into account in other funding programmes, such as the [European Structural and Investment Funds](#): the European Fund for Regional Development (EFRD), the European Agricultural Fund for Rural Development (EAFRD) and the European Maritime and Fisheries Fund (EMFF). They aim at better cohesion among EU countries and are available for cultural infrastructure and cultural heritage projects. The European Social Fund (ESF) finances employment and mobility projects, particularly for young people, making funds available for the acquisition of skills and lifelong learning, also in or via the cultural sector.

Other funding programmes also support the sector. The research programme [Horizon 2020](#) provides financial support (over [€550 million](#) between 2014 and 2020) for projects on technological or sociological aspects of cultural heritage (such as identity, cultural diplomacy, digitisation or 3D

Figure 5 - Multiannual Financial Framework 2014-2020



Data source: [EPRS](#) (European Commission)

modelling). SMEs can apply for [COSME](#) funding, which supports small businesses, their creation and activities such as content digitisation and production, new technologies and business models or fashion and design ([WORTH pilot project](#)). The [Connecting Europe Facility](#) funding devoted to infrastructure, including digital, co-finances to the tune of [€45 million](#) the digital platform [Europeana](#). This provides access to over 50 million digitised items such as art, manuscripts, music, films, photographs (among other things from World War I), or fashion, coming from museums, archives, libraries and galleries in the EU.

Deliveries of the 2014-2019 parliamentary term

Policy initiatives

The strategic objectives of the 2007 Agenda for Culture were translated into four priorities in the 2015-2018 [Work Plan for Culture](#), adopted by the Council in December 2014. They included accessible and inclusive culture, cultural heritage, the cultural and creative sectors, creative economy and innovation, and promotion of cultural diversity, including in external relations.

The creative economy and innovation rely heavily on new technologies, particularly digital ones. One of the flagship initiatives of the European Commission for the period 2014-2020 has been the European [digital single market](#) aimed at encouraging fair conditions of access to online services for individuals and businesses; competitiveness and fair competition, and enhancing the growth of the digital economy. All these issues are important for CCI, creators, artists, and users of such services.

Cultural and creative sector

The increasingly unstable environment of the music industry prompted the European Parliament to propose the Preparatory Action, '[Music Moves Europe](#): Boosting European music diversity and talent'. Funded under the Creative Europe programme, and operating since 2015, it seeks to explore ways both to support talented Europeans and to enhance the competitiveness of the sector, which employs more people than the film industry. The short and medium term results should help to better understand market trends, identify distribution models, increase access to music, promote local repertoires and European music internationally, and aid artists' cross-border mobility.

In order to address challenges faced by the CCI, namely patenting and access to funding, a pilot project '[Finance, Learning, Innovation and Patenting](#) for Cultural and Creative Industries', with a budget of €1 million, will investigate these aspects and analyse spill-overs.

Access to culture and cultural diversity in the EU

Thanks to the regulation on cross-border [portability of online content services](#), Europeans travelling in the EU for leisure, business or learning, can now access online content (for example audiovisual material) provided by services they have purchased at home. The core issue here is to balance the rights and interests of consumers, rights holders and service providers. The issues at stake include territorial licensing, which is a cornerstone of the financing of cinematographic productions, and the verification of the subscriber's country of residence, in order to ensure that the copyright and related rights are collected in the correct place, and to avoid dishonest practices by service providers or rights holders.

With the rapid growth of the audiovisual market, and increasing access to on-demand content via smartphones or tablets, access to culture is also an issue in the context of the [Audiovisual Media Framework](#). The related European Commission proposal aimed to ensure the achievement of a minimum 20 % quota of European works also in video-on-demand (VoD) or subscription video-on-demand (SVoD) catalogues. At the insistence of Parliament during negotiations on the file, the legislation as finally adopted sets the quota of European content at 30 %. Service providers will also have to make sure audiovisual services are continuously and progressively more accessible to people with disabilities.

To further promote a rich European audiovisual offer, and to enable access to it despite language barriers, the EP initiated a pilot project and a [preparatory action](#) on subtitling audiovisual content on the Franco-German TV channel, ARTE. [Subtitling](#) in Spanish and English, since November 2015, in Polish, since November 2016, and in Italian, since 2017, has increased the potential audiences from an initial 32 % to 70 %.

Cultural heritage

In August 2016, the Commission presented its [proposal](#) for a European Year of Cultural Heritage (EYCH) in 2018 to celebrate rich European cultural heritage via debates, exhibitions, awareness raising, information and educational campaigns, numerous events, research and studies, as well as networking, preservation and digitisation good practices and experience sharing.

The EYCH was officially inaugurated in December 2017 at the [Culture Forum in Milan](#). Key events in 2018 included a high-level [Innovation and cultural heritage](#) conference in March in Brussels, a European [cultural heritage summit](#), 'Sharing Heritage, Sharing Values', in Berlin in June, and a high level conference in the EP the same month. The so-called '[Berlin call to action](#)', 'Cultural Heritage for the Future of Europe', presented at the summit, was signed by more than 2 000 citizens and organisations from all over Europe. It promotes seven actions to: develop the European action plan for cultural heritage; recognise heritage as a priority in European policies and funding; bring together local, national and European levels of heritage governance; preserve and transmit heritage that is unique and irreplaceable; invest in quality heritage-led regeneration; promote deeper knowledge and understanding of heritage; and to widen the mobilisation for cultural heritage.

During the EYCH, [over 6.2 million people](#) attended 11 700 events across 37 countries, since the 2018 celebrations were not limited to the EU. 29 [cooperation projects](#) received €5 million funding from the Creative Europe programme; research and innovation projects on cultural heritage received €66 million from the Horizon 2020 programme, and over 10 000 projects obtained the official label of the EYCH.

In November 2018 the European Commission organised the Fair of European [Innovators in Cultural Heritage](#) to allow those who benefited from the Horizon 2020 research and innovation funding to present their projects and products, exchange their experiences and discuss achievements.

Results of the EYCH include: the '[World heritage journeys Europe](#)' website, put up together with Unesco and featuring world heritage sites in Europe; a project aimed at bringing intangible cultural heritage to youngsters in about 2 000 schools; training workshops, and the [EU/Unesco Young Heritage Experts](#) Forum for 25 to 32-year olds.

In line with the EYCH slogan, 'Our Heritage: where the past meets the future', modern technologies were also part of the celebrations. [Cultural gems](#) is an application – a social sharing platform – featuring 168 cities in 28 EU countries allowing its users to share and contribute information on museums, theatres, memorials, cultural heritage sites and other cultural and creative spaces.

Aiming to make its legacy last, and in line with the Berlin call, the Commission published the European Framework for [Action on Cultural Heritage](#) in December 2018 at the closing conference in Vienna. It outlines around 60 cultural heritage actions for the years 2019-2020 in five domains namely: inclusive Europe, cohesive and sustainable future, safeguarding endangered heritage, knowledge and research, and international cooperation.

Culture in external relations

Cultural diplomacy is important for strengthening the place of Europe's culture and its cultural and creative industries, as well as for enhancing the peace and stability in the world. In the light of massive investment by China and the US in this domain, a [Cultural Diplomacy Platform](#) was set up in 2016 to facilitate networking and cooperation among cultural stakeholders in the EU and provide advice on cultural policy. The creation of European Culture Houses, as suggested in a [study](#) produced for the EP Culture and Education Committee, is to be tested in a [preparatory action](#) as a

tool for EU cultural cooperation with third countries. With a view to promoting European films [beyond the European Union](#), EU delegations all over the world organise [film festivals](#) featuring a selection of films from a number of EU countries.

A way forward: education and culture, creators' remuneration

On the occasion of the social summit for fair jobs and growth in November 2017 in Gothenburg (Sweden), an informal Council meeting of EU heads of state or government took place under the setting of the Leaders' Agenda to discuss new challenges. The first encounter of this type focused on [education and culture](#). Recognising the importance of education and culture not only for competitiveness but also for inclusiveness, societal cohesion, and as a unifying force, it stressed the need to enhance cooperation in all these areas.

As a result, the Commission published two papers in May 2018. The first, a new policy communication entitled '[Building a stronger Europe: the role of youth, education and culture policies](#)', places education and culture and the awareness of Europe's shared cultural heritage and history at the top of the policy agenda, together with media literacy, cultural professionals' mobility and CCIs. The second, 'A New European [Agenda for Culture](#)', focuses on three main areas of cultural actions relating to the social, economic and international dimensions. It proposes specific actions, such as: 'cultural and creative spaces and cities' to promote cultural inclusion and urban regeneration; a mobility scheme for cultural professionals; promotion of arts in education (from early childhood to Erasmus+ participants and adult education); development of creativity and interdisciplinary higher education studies (arts, technology, entrepreneurship); support for an OECD project on teaching, learning and assessing creative and critical thinking; dialogue with the music and film sectors; and measures to promote fair remuneration of artists and creators, and gender equality. An [online European films directory](#), launched in spring 2019, will aim to promote European films via its dedicated VOD database, while EU-promoted projects, such as the one on a [film literacy](#) methodology for schools, aim to develop both audiences and critical thinking among young Europeans.

The [Copyright Directive](#), adopted in March 2019 by the European Parliament and the Council, after long and heated debates, aims to secure creators' income from their work made available on internet platforms, without affecting the rights of those interested in accessing this content online. It provides for a mechanism to allow performers and authors to get paid for works available on large commercial services platforms, while introducing a lighter model of requirements for SMEs that have been in business for less than three years and have less than 5 million monthly users. Following publication in the Official Journal of the EU, EU countries have 24 months to transpose it into their legal systems. The intention is that, by protecting creators' remuneration, the diversity of European cultures will also be protected, and that EU citizens will be free to access and contribute to this cultural diversity.

Budgetary initiatives

The flexibility of the Creative Europe funding arrangements have made it possible to provide extra financing in unforeseen circumstances, such as the social integration of a large number of refugees arriving in the EU, assisting with the financial difficulties of the European Union Youth Orchestra (EUYO), or supporting the European Year of Cultural Heritage (EYCH).

The European Year of Cultural Heritage

The Commission's original legislative [proposal](#) for the EYCH envisaged funding coming mostly from the very limited resources of 'the Creative Europe' programme, and from the complementary financing usually available for cultural heritage. After the EP's initial call for an independent budget of €15 million, an agreement was finally reached on a total budget of €8 million, with €3 million from the Creative Europe programme.

The European Youth Orchestra

The European Union Youth Orchestra (EUYO), consisting of world-class young musicians from all EU countries, was initiated by a 1976 EP resolution as a unique European cultural project. The EUYO, despite its role as EU cultural ambassador, lost its funding under the Creative Europe programme and faced financial difficulties in 2017. A subsequent [amendment](#) to the programme's regulation, supported by the EP, guaranteed further funding, recognising the role the EUYO plays in promoting European music and its circulation worldwide, as well as the mobility of young musicians.

The European Fund for Strategic Investment

Although culture as such was not among the [ten priorities](#) of the Juncker plan, nor included in the Commission's original [proposal for the regulation](#) on the European Fund for Strategic Investments (ESIF), the fund contributed [€60 million](#) to the [Cultural and Creative Sector Guarantee Facility](#) under the Creative Europe programme, applicable as of 2016. With this funding the guarantee reached a total amount of €181 million, so triggering the total of [€1 billion](#) in loans. Thus, €25 million worth of loans for [Czech CCI SMEs](#), and the same sum for [Belgium](#), have been available since March 2018, in addition to the [€230 million](#) worth of loans already available in France, Spain and Romania.

Potential for the future

Budgetary outlook

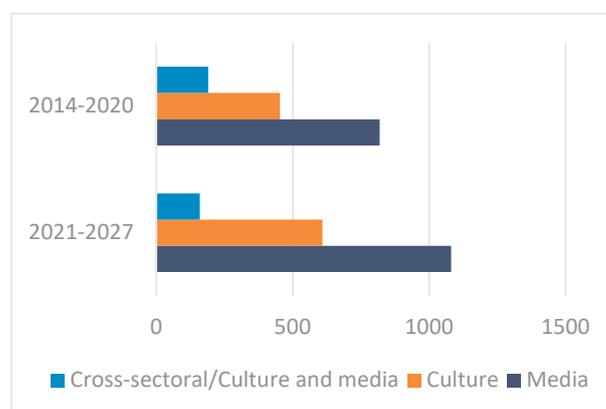
A proposal for a regulation establishing the 2021-2027 'Creative Europe' programme, published at the end of May 2018 under Heading 2 'Cohesion and Values' and Title 7 'Investing in People, Social Cohesion and Values', provides for an overall budget of €1.85 billion, of which €1.081 billion for the Media strand, €609 million for the Culture strand, and €160 million for the cross-sectoral strand. In its first-reading position on the proposal, the European Parliament called for a near doubling of the programme's budget, setting it at [€ 2.806 billion](#).

The proposal introduces some new concepts in the third strand, such as quality journalism, media literacy and freedom of pluralist media, and creation across different sectors (Creative Innovation Lab). The Financial Guarantee Facility would no longer belong to this strand and would be moved to the [Invest EU Fund](#). The culture strand focuses on cultural heritage and architecture with the promotion of *Baukultur*, and the mobility of artists and cultural operators. The overall funding structure reflects the approach presented in the New Agenda communication, targeting the promotion of social inclusion and impact on democracy. The renewed emphasis on the artistic and creative value of culture is likely to be welcomed, given the current programme's strongly criticised, mostly economic focus. The proposal also introduces climate objectives and enhanced gender equality through its retention as a criterion for project selection and through the promotion of female participation.

On the practical side, the proposed regulation offers simplification via lighter reporting procedures and 'cascading grants', allowing beneficiaries to offer support to third parties and thus facilitating access to funding for smaller operators. The European Film Academy and the EUYO would be allowed to be awarded grants without a call for a proposal.

The proposed increased budget, greater flexibility and simplified procedures address the mid-term review criticism of the programme's underfunding in relation to its geographical scope and the size of the cultural sector in the EU.

Figure 6 - Creative Europe budget in € million



Data source: [EPRS](#), 2016, European Commission, [2018](#).

Policy strategies and debates

Culture, education and CCI have recently been the focus of high-level speeches. Opening the first leaders' debate (Leaders' Agenda) in Gothenburg on culture and education, the [European Council President](#) Donald Tusk pointed out that the specific ideas discussed there were put forward by the Member States, not the EU institutions. Jean-Claude Juncker, President of the European Commission, which provided [input](#) for the meeting, stressed the potential of culture and education for the social and economic development of the EU, and for giving a meaning to the European project. Similarly, the EP President Antonio Tajani, [launching](#) the European Year of Cultural Heritage at the Culture Forum in Milan, further developed the idea of culture's potential for social cohesion and European unity, as well as the arts, cultural heritage and technology as catalysts of growth and employment.

The May 2018 Commission communication and the financial proposal for 'Creative Europe' both point clearly towards synergies between education and culture, to lead to a greater sense of unity and belonging. The effects of such synergies are likely to be long in coming, but they are expected to democratise access to and interest in culture and the arts, with beneficial effects on social cohesion, well-being, tolerance and critical thinking. The focus on arts and culture, combined with technological and business knowledge, is the basis for the growth potential of the CCI, a highly qualified and mobile work force, and entrepreneurs. But this might entail addressing the socio-economic conditions of artists and creators in areas such as taxation and social security and copyright revenue in the digital environment.

Against a background of global competition among cultural and creative industries, and political instability in many parts of the world, the EU's cultural diplomacy activities have a valuable role to play. This involves not only promoting European CCIs, but also enhancing peaceful and stable international relations through cooperation on the protection of cultural heritage and recognition of the importance of the preservation and promotion of cultural diversity.

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