EXECUTIVE SUMMARY
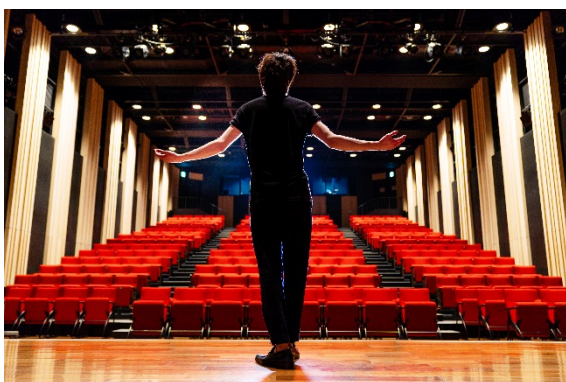
Research for CULT Committee – Cultural and creative sectors in post-COVID-19 Europe – crisis effects and policy recommendations

Pre-COVID-19, the Cultural and Creative Sectors (CCS) were already characterised by fragile organisational structures and working practices. The fragmented organisation of value chains, the project-based working and the (not well-protected) IP-based revenue models are only a few elements contributing to this.

## Large parts of the CCS are hard-hit by the COVID-19 crisis

Since the COVID-19 pandemic hit Europe in spring 2020, the **CCS have been among the most negatively affected sectors**. The containment measures that have been put in place throughout the EU have led to a chain of effects, severely impacting the economic and social situation in the CCS (see Figure 1)[1]. Especially the venue- and visitor-based sub-sectors such as the performing arts and heritage were most severely hit. Furthermore, the crisis has highlighted the very vulnerable position of many non-standard workers in the CCS, such as artists, freelancers or temporary workers.

The present document is the executive summary of the study on "Cultural and creative sectors in post-COVID-19 Europe – crisis effects and policy recommendations". The full study, which is available in English can be downloaded at: https://bit.ly/3jzUNgA

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[1] The analysis of the effects in this study primarily relates to the period March-September 2020.

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Figure 1:   The impact of the COVID-19 crisis on the CCS – a chain of effects
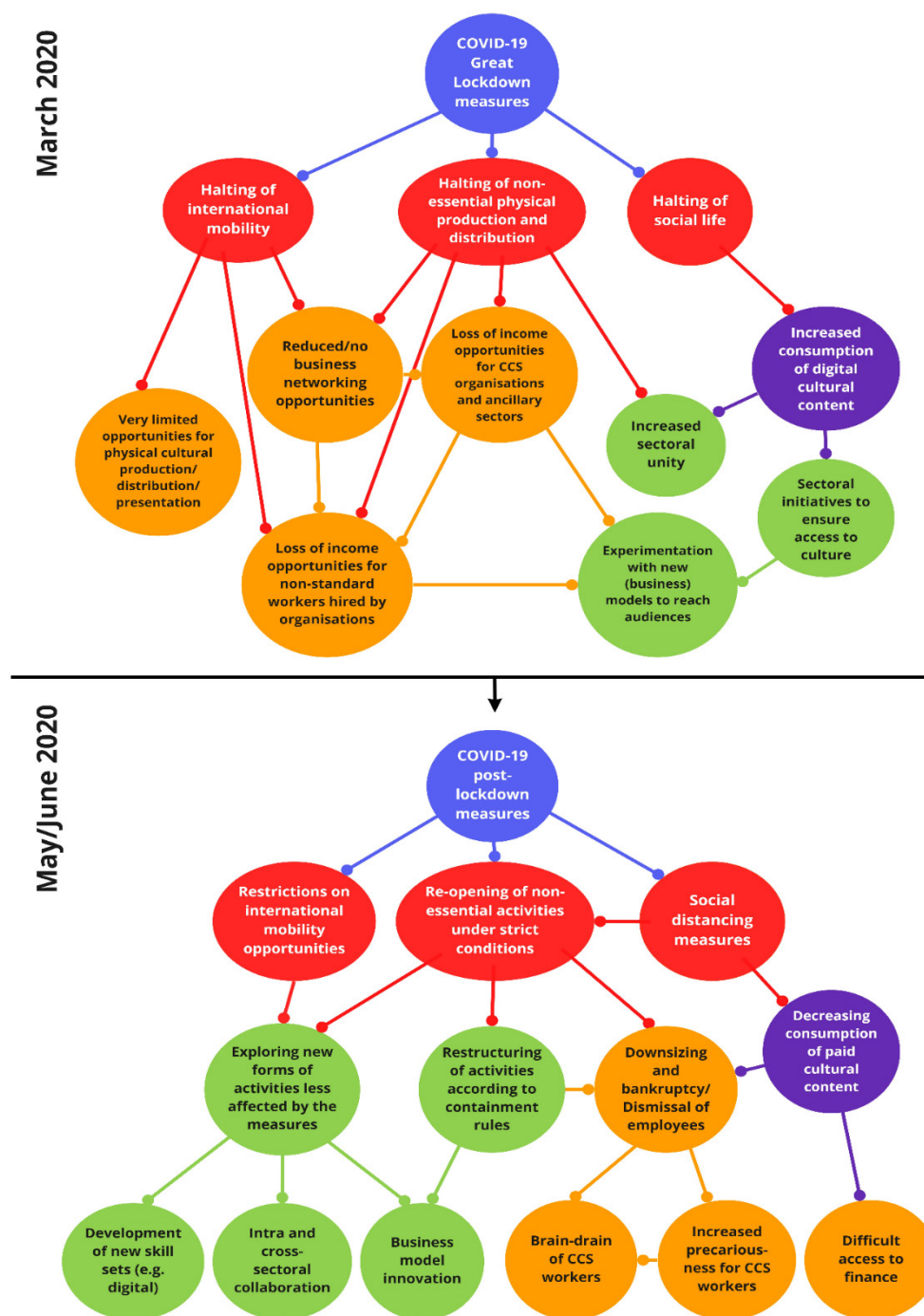
Policy support focuses on emergency measures, not (yet) on relaunch and innovation

Policy makers in Europe have taken considerable and unprecedented measures to support the CCS during the crisis. Until autumn 2020[2], **public measures primarily focused on short-term emergency support**. Non-public supporters such as collecting organisations and foundations were more inclined to support the CCS by providing innovation-related support. Nevertheless, the expected losses of income for the CCS by far outweighs the support measures in place. Moreover, innovation topics highlighted in emergency and relaunch support measures lacked a broad perspective – addressing beyond the digital opportunities (current) major crises affecting the CCS and their role in society at large (in relation to e.g., health, environmental, social cohesion, international solidarity and economy).

The CCS are an integral part of the EU's way out of the crisis, if built on more sustainable systems

While the COVID-19 crisis continues to heavily impact the CCS in 2021, it also provides **momentum to further accelerate a number of trajectories towards more sustainability** that emerged prior to or during the crisis. Given the multilevel vulnerabilities that characterised the sectors already pre-COVID-19, a return to the 'old normal' after the crisis is not considered as a viable option. A more systemic transition is needed in which unsustainable practices (related to, e.g., vulnerable working situations, fragile remuneration structures) are replaced by more sustainable alternatives. The alternatives that emerged during the crisis provide a strong foundation upon which to further develop.

During the crisis many **CCS workers and organisations have shown their innovative power to experiment with possible alternatives**, often in collaboration with new partners. When the containment measures forced CCS organisations and freelancers to halt their normal activities, many promptly adapted to new digital distribution formats – with interesting lessons learnt to further build upon. The CCS witnessed an increased sectoral unity through numerous joint actions and movements. But the **most striking opportunities that the crisis has accelerated relate to the great contribution of CCS organisations and professionals to the well-being of citizens, social innovation and social cohesion.**

To accelerate these opportunities, support for innovation and experiments will be crucial. The 2030 **Sustainable Development Goals of the United Nations can serve as a powerful compass for** steering (support for) the transition process as they set clear and internationally approved ambitions and mobilise every citizen, organisation, sector or institution to contribute. The crisis has illustrated the power of the CCS to be(come) a substantial partner in the EU's commitment to implement the United Nations' 2030 Agenda.
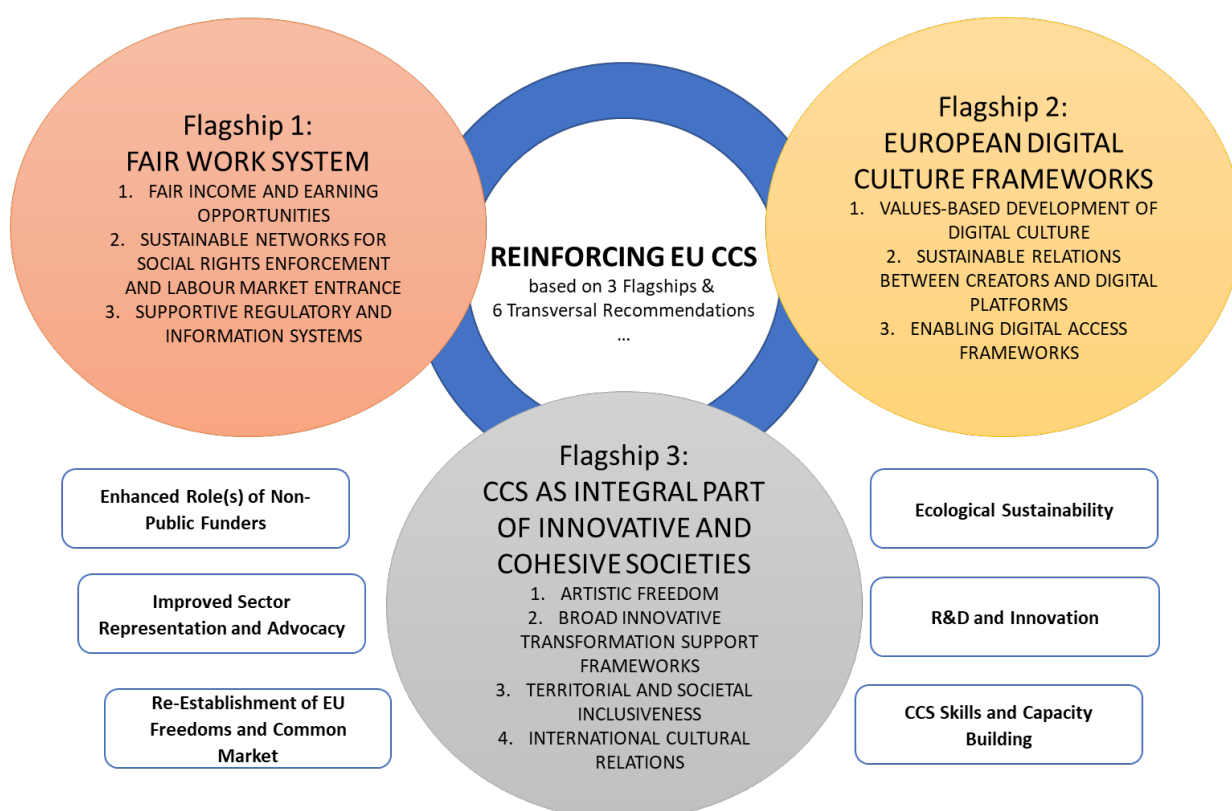
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[2]   The analysis of policy support measures in this study covers the period of March to September 2020

Reinforcing the CCS requires substantial public commitment and investment

It is now of critical importance to **capitalise on the most forward-looking new approaches** and to further develop them into sustainable policies and practices. Policy makers have an **important role to play in accelerating the upscaling and consolidation** of those new approaches, while at the same time ensuring the phasing out of unsustainable structures and practices in the CCS. To this end, we have clustered our recommendations for policy action into **three Flagship Initiatives** for a long-lasting and sustainable recovery of the CCS. Each Flagship consists of several crucial pillars that require policy action.

In addition to the Flagship Initiatives, we also recommend that policy makers **address a number of transversal issues**. These include among others, ecological sustainability, skills development, access to R&D and innovation systems, and a re-establishment of the EU freedom of movement and common market.

Flagship 1:
FAIR WORK SYSTEM
1. FAIR INCOME AND EARNING OPPORTUNITIES
2. SUSTAINABLE NETWORKS FOR SOCIAL RIGHTS ENFORCEMENT AND LABOUR MARKET ENTRANCE
3. SUPPORTIVE REGULATORY AND INFORMATION SYSTEMS

REINFORCING EU CCS
based on 3 Flagships &
6 Transversal Recommendations
…

Flagship 2:
EUROPEAN DIGITAL CULTURE FRAMEWORKS
1. VALUES-BASED DEVELOPMENT OF DIGITAL CULTURE
2. SUSTAINABLE RELATIONS BETWEEN CREATORS AND DIGITAL PLATFORMS
3. ENABLING DIGITAL ACCESS FRAMEWORKS

Flagship 3:
CCS AS INTEGRAL PART OF INNOVATIVE AND COHESIVE SOCIETIES
1. ARTISTIC FREEDOM
2. BROAD INNOVATIVE TRANSFORMATION SUPPORT FRAMEWORKS
3. TERRITORIAL AND SOCIETAL INCLUSIVENESS
4. INTERNATIONAL CULTURAL RELATIONS

Enhanced Role(s) of Non-Public Funders

Improved Sector Representation and Advocacy

Re-Establishment of EU Freedoms and Common Market

Ecological Sustainability

R&D and Innovation

CCS Skills and Capacity Building

Further information

This executive summary is available in the following languages: English, French, German, Italian and Spanish. The study, which is available in English, and the summaries can be downloaded at: https://bit.ly/3jzUNgA

More information on Policy Department research for CULT: https://research4committees.blog/cult/

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