

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

FINAL REPORT - KEYPOINT

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FINAL REPORT - EXECUTIVE SUMMARY

The cultural sector in the EU – an overview

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

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

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

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

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

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

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

Good practices for training and qualification

- A large number of good practices in the EU are related to the new job profiles within digital culture and offer corresponding qualification measures. However, In the light of the enormous need for qualification, they are still no where near sufficient in number.
- Particularly in the sector of „traditional“ culture, there are numerous outstanding good practices in the area of qualification (for example, LIPA, DSA) which are having a

radiating, „oil-on-water-effect“ on other existent training institutes. Within the context of these innovative environments, new qualification tools are continually being developed.

- As a rule, the outstanding good practices are organised as public-private-partnerships. Company involvement has proven its worth, but can turn out to be problematic, namely if companies place too high a priority on their demand for short-term returns.
- Although a considerable amount of EU funding is available in particular for cross-border initiatives, there are very few qualification measures within a cross-border context to be found in the EU region.
- The duration of most of the projects is limited. In addition, the networking of projects through relationships to universities, colleges, etc is very limited.

Obstacles to mobility

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

Overall assessment

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

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

Final report - recommendations

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

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

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

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

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

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

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

Recommendations are made at three levels:

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

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

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

1. Policy Orientation and Integration

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

• Networking of Measures

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

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

• New Forms of Action Programmes

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

- Cultural labour market funding programmes on the national and European levels. The programme “newstart”, carried out in Austria from 1999-2000 is an example of such a programme.
- Specific programmes for SMEs (small and medium-sized enterprises) in the area of culture and media, with the goal of promoting both “high” and “low” culture. By means of an improved networking of administration and policy-making departments on the European and national levels, such programmes could be organised with much greater efficiency than is possible today.
- It should become a principle of educational policy in the EU that musical and artistic subjects (in connection with the use of digital technologies and forms of communication) should already be given highest priority in the curricula of primary schools, in order to promote creativity at the age where it manifests itself the most. However, since the educational sector is organised exclusively on the national and regional levels, this goal requires an especially intensive and co-operative information exchange between the responsible EU institutions and the national/regional decision-makers. A possible measure on the EU level would be the provision of funding for the equipping of schools with multimedia hardware.

• Trans-national and cross-border co-operation

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

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

2. Information and Communication

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

• Harmonised statistical basis

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

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

• Monitoring trends in employment and skill requirements

- In addition to improving official statistical data, it is important to regularly analyse the constantly changing employment trends and qualification requirements in the traditional cultural sector and, in particular, within the digital cultural sector (monitoring and evaluation) on a European level. The results must then be taken into account as early as possible in the development of respective training measures.
- Since digital culture is subject to very rapid technical and personnel changes, regular monitoring of these trends is only possible by directly contacting the companies in digital culture. This has been shown by our study. A regular European-wide company survey – possibly structured on a regional basis - would provide the digital culture sector and decision-makers with a dynamic, web-based research resource to make skills and labour market information available on demand.

• European Job-Information Platform for digital culture

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

- Increased transparency of the labour market in the cultural sector and in the digital culture on a European level can be achieved by the creation of a European Information Platform that closes the information gap between workers and employers. In the

development of this platform, the high percentage of freelancers within the digital culture must be taken into consideration.

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

3. Affirmative Action Programmes

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

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

• Training and qualification

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

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

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

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

• Strengthening Entrepreneurship

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

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

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

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

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

• New Programmes

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

- A joint programme for cultural investment
The European Fund for Regional Development (ERDF) and the European Social Fund (ESF) should initiate a joint programme for social cohesion through cultural activities. In particular, this programme would have to include projects of cultural tourism and the improvement of the technological infrastructure in the cultural sector. Within this context, particular attention should be paid to placing the subsidisation emphasis on long-term, sustainable and employment effective projects instead of on one-time events.
- Creation of decentralised media labs
The equipping and running of regional media and cultural workshops (public communication centres for the arts, culture, media and ICT) should be promoted within the entire EU region. These media and cultural workshops, which represent a further development of the Cultural Initiatives Model, must be accessible for every individual (local access to new technologies).
- In particular, cross-border projects should be taken into consideration within the context of such initiatives, since considerable employment potential exists within the inner-EU border regions – a potential which, due to under-developed cross-border collaborations, has hardly been exploited.

- **Access of marginalised groups and regions to products of digital culture**

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

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

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

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

CONCLUSION

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

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

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

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

Final report – recommendations

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

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