Contribution of the Creative Europe Programme to fostering Creativity and Skills Development in the Audiovisual Sector

FINAL REPORT

A study prepared for the European Commission
DG Communications Networks, Content & Technology by:

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IDEA CONSULT thinking ahead

Digital Single Market

This study was carried out for the European Commission by:

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ABSTRACT

A study was undertaken to identify the skills needed in the audiovisual sector, evaluate the contribution of the Creative Europe MEDIA Training Actions to closing skills gaps, formulate recommendations and cross-check with policy goals. The study considered the 58 Training Actions selected via the first call for proposals. These Actions have received funding of €7.98m and provided training in 33 countries.

The main findings are that the Training Actions are unique, highly valued and effective. They address a range of skill needs and support a diversity of nationalities. Learning is highly personalised, individualised and relational, with a heavy emphasis on collaboration with other participants and experts. Participants are supported to take forward projects such as new scripts or productions. Training Actions deliver the intended impact on participants, including improved skills, access to market, contacts and networks.

The main recommendations are to make the Training Actions sustainable without EU funding and more widely available to audiovisual professionals.

RÉSUMÉ

Une étude a été réalisée afin d'identifier les compétences requises dans le secteur audiovisuel, d'évaluer la contribution des actions de formation de l'Europe Créative MEDIA pour combler les lacunes de compétences, formuler des recommandations et faire une contre-vérification avec les objectifs stratégiques. L'étude a considéré les 58 actions de formation sélectionnées par le biais du premier appel à propositions. Ces Actions ont été financées à hauteur de €7,98 millions et ont fourni des formations dans 33 pays.

Les principales conclusions sont que les actions de formation sont uniques, très appréciées, et efficaces. Elles s'adressent à une vaste gamme de besoins de compétences et soutiennent une diversité de nationalités. L'apprentissage est personnalisé, individualisé et relationnel. Elle met fortement l'accent sur la collaboration avec les participants et les experts. Les participants sont pris en charge pour faire avancer des projets tels que de nouveaux scripts ou productions. Les actions de formation ont l'impact attendu sur les participants, dont une amélioration des compétences, de l'accès aux marchés et l'élargissement du réseau de contacts.

Les principales recommandations sont de rendre les actions de formation plus durable sans le soutien des fonds de l'UE, et de les rendre plus largement disponibles aux professionnels de l'audiovisuel.

EXECUTIVE SUMMARY

Introduction

This report presents the findings for the study on the Contribution of the Creative Europe Programme to fostering Creativity and Skills Development in the Audiovisual Sector. The study was undertaken by the Centre for Strategy and Evaluation Services (CSES) and IDEA Consult on behalf of the European Commission Directorate-General for Communications Networks, Content and Technology (DG CNECT).

The main objectives of the study have been to: a) identify the skills needed in the audiovisual sector; b) evaluate the relevance, efficiency and effectiveness of the current MEDIA Training Actions in contributing to closing skills gaps; and c) formulate recommendations. These objectives have been pursued through collection and analysis of data from multiple sources, including literature, interviews with stakeholders at EU and national level, MEDIA programme documentation, project documentation and data, interviews of project promoters and an on-line survey of participants in training.

One of the priorities of the Creative Europe MEDIA Sub-programme is to facilitate the acquisition and improvement of skills and competences of audiovisual professionals and the development of networks. These skills include financial management and the use of digital technologies to ensure the adaptation to market development, testing new approaches to audience development and testing of new business models. To that end, the programme provides support for MEDIA Training Actions promoting the acquisition and improvement of skills and competences by audiovisual professionals, knowledge-sharing and networking initiatives, including the integration of digital technologies, innovative business models and financing.

The Training Actions build on a history of EU support for the audiovisual sector dating back at least as far as the MEDIA I Programme (1991-95). The current MEDIA Sub-programme supports Training Actions that take the form of workshops and/or on-line coaching sessions and dissemination tools by using proven or testing new learning, teaching and coaching methods and best practice dissemination. They include:

- European actions aimed at the acquisition and improvement of skills and competences for professionals to operate mainly in Europe; and

- International actions aimed at building expertise, knowledge and capacities for European professionals to network and collaborate with non-European professionals to enable access to international professional networks.

Analysis of sector skills needs

The audio-visual sector in Europe faces a number of challenges. In brief, these can be summarised as adjusting to globalisation, the digital revolution requiring new skills-sets, and restructuring/recovery of the audio-visual industry in light of the economic and financial crisis. With regards to skills needs, it is anticipated that, in the foreseeable future:

- Rapid digital and technological evolutions will continue to create a need to develop workers' craft and technical skills. What will be new is that the combination of

technical skills, i.e. multi-skilling, will become increasingly important due to budget cuts and technological evolutions.

- Other skills clusters are expected to become more important, like entrepreneurial and business skills. As the audio-visual sector is already characterised by a high share of micro-organisations and freelancers and their presence is expected to increase, more and more audio-visual workers will have to be able to manage their own businesses.

- As audio-visual work is generally organised around projects and job security is decreasing, workers will also increasingly need to develop career skills in order to be able to use their skills and combine jobs in order to remain employable.

- From an organisational point of view, raising awareness about the importance of training will remain high on the political agenda since many workers and their employers do not (sufficiently) invest in training.

Although the audio-visual single market is not complete (i.e. the European market is fragmented in the audio-visual industry), in practice, some audio-visual professionals operate very internationally. In order to operate internationally and address the challenges faced by the sector, provision of training to address the following categories of skills needs is seen as a priority:

- Craft-specific skills;

- ICT/digital skills;

- Business management skills;

- Leadership, innovation & entrepreneurship; and

- Interpersonal, social and cross-cultural skills.

Activities and effects of MEDIA Training Actions

The Training Actions that formed the focus of the study were those selected via the first call for proposals within the current Creative Europe Programme (2014-2020). This call received 114 applications requesting funding of €16.84m. Of these, 58 were eventually funded to the tune of €7.98m. The majority of these Training Actions will continue into a second year (i.e. 2015/6), subject to approval of the first year's deliverables (including budget, work programme) by EACEA.

The Training Actions are led by organisations in 17 different countries. Most (34) are led by organisations in the largest countries with the largest audiovisual sectors (France, Germany, Italy, UK). There is greater diversity in the location of the training activities, with such training taking place in 33 countries, including 23 EU Member States and 10 other countries (e.g. Argentina, Canada, USA). Five are International Actions that support national from countries not participating in the Creative Europe Programme.

The "approach" of Training Actions is unique, highly valued and effective. The feedback from participants and other stakeholders is consistently positive regarding the quality and effectiveness of the Actions. As intended, there is considerable diversity in the Training Actions in terms of content, format and participation. However, there are certain characteristics that are common to the Actions and that make them effective, i.e. they are up-to-date, transnational, multi-disciplinary or multi-sectoral, highly relational and personalised, project-based, focused on delivering

tangible end-products and concrete outcomes and supportive of professional networking.

The MEDIA Training Actions are diverse in terms of content and skills provided. Although each Action is selected on the basis of its individual merits, the overall selection of Training Actions is diverse and addresses a range of sector skill needs. A diversity of occupations and parts of the value chain are served. Participants tend not to lack digital skills and so the emphasis is on providing the skills need to work in a fast-changing digital environment, rather than the provision of digital skills as such. There are also instances of provision for non-audiovisual professionals working in the sector, e.g. finance and legal professionals.

There is a good selection of participants in MEDIA Training Actions, which mostly reflects the intentions of the programme, although the total number of participants remains low due to the modest funding available. The demand to participate in Training Actions generally exceeds the supply of places available (although the method of selecting participants varies and consistent data is not collected on the overall level of demand). Participants are active professionals working in the industry, usually with at least a few years' experience and with project ideas or ambitions that they wish pursue. There is a good diversity of professions/occupations represented amongst participants. There is also a good gender balance in the cohort of participants with almost even numbers of male and female participants across the Training Actions as a whole. This is in contrast to the audiovisual sector as a whole, where women are under-represented as professionals.

There is a diversity of nationalities and countries of operation within each Training Action and across all Training Actions, including many professionals from low capacity countries and from non-EU Member States. Countries with a high or medium capacity for audiovisual production are not over-represented amongst participants (relative to their population size), whilst some, though not all, countries with low capacity are well-represented. However, there is some evidence that repeat participants constitute a significant proportion of the cohort of some Training Actions. The focus on serving existing professionals also means that young or new professionals with limited experience tend not to be served by the Training Actions.

MEDIA Training Actions deliver the intended impact on participants. There is a consistently high rate of satisfaction amongst participants. The benefits include new or improved skills that relate to the needs of the market, including craft-specific skills, skills to operate in a digital environment, business, leadership and management skills, and interpersonal and cross-cultural skills; greater capacity to operate internationally; improved access to market, in some cases including real opportunities to pitch new works and new contracts or financing secured; and improved contacts and networks that endure beyond participation in the Training Action.

"Pedagogical" analysis of Training Actions

Evidence from the study shows that considerable effort is made to make the Training Actions relevant to current needs. The objectives, focus and content of Training Actions is generally determined by professionals operating in the industry, usually at a high level. Training Actions are also updated each year to reflect current developments in the industry, as well as the needs of each cohort of trainees. Technology and the

digital shift are integral to most/many Training Actions but this manifests itself in different ways, including new uses of technology within creation, production and distribution, new business models to address the digital shift and use of technology to deliver learning.

Training Actions tend to carefully select a small number of participants for in-depth support, rather than serving large numbers in a more superficial way. Participants are selected to be diverse, although the nature of that diversity varies; for some projects, participants come from different parts of the value chain, whilst in others they come from different sectors or different occupations. In all cases, there is a diversity of nationalities. Training Actions mostly attract participants by word-of-mouth or professional networks and some are over-subscribed. Prior to recruitment, Training Actions typically "screen" applicants to ensure that participants are those that stand to gain most and also to inform the specifics of course design and content. Trainers and experts are drawn from a diversity of European and non-European countries and from different professions in the sector.

There is considerable diversity in the type of training offered, but Training Actions are mostly based on residential and face-to-face forms of training. Indeed, this is essential to the delivery of in-depth, personalised support as well as to the facilitation of networking. Electronic and online learning is widely used, but as a complement or follow-up to face-to-face sessions. The innovative element of Training Actions thus relates to the package of support and its relation to current developments in the industry rather than to testing new pedagogies or innovative forms of delivering training.

Learning is highly personalised, individualised and thus relational, with a heavy emphasis on building collaborations with other participants and with experts working in the field. It is very often also project-based, with participants typically taking forward personal or corporate projects, such as new scripts or productions, with the Training Action supporting participants to develop them and ultimately take them to the market. In that context, follow-up is crucial and takes place in many ways, both to maximise impact and also to identify successes and learn lessons to inform future activities.

Dissemination of results is a key part of Training Actions and takes place in many different ways, with most projects using brochures/printed materials, websites, social media, festivals and so on. Training Actions have presented results at festivals and other events but have also disseminated tangible outputs, including audio-visual works developed and training tools and materials. Although cross-overs with other cultural and creative industries feature in some Training Actions, these have not been of fundamental importance to most; most cross-overs feature within the audio-visual sector (including financing and legal), rather than with other sectors

Relevance and European added value

MEDIA Training Actions are relevant to the needs of audiovisual professionals in the industry. The selection process prioritises projects that address proven needs but is not unduly prescriptive; training providers can design training that responds to the skill needs that they identify, in a dynamic and fast-changing marketplace. As a result, Training Actions are addressing current skill needs of fundamental importance, i.e. the need for audiovisual professionals to: continually update craft-skills/technical skills, e.g. in light of technological developments, as well as multi-skilling; acquire

entrepreneurial and business management skills; develop career skills based on the need to work on a project basis (in an insecure environment) and learn how to bring works to market; and develop new business models and new ways of monetising content in a digital environment.

MEDIA Training Actions provide a unique form of European added value. They are distinct from the support for higher education and vocational training offered by Erasmus+, which mostly does not provide training that is directly related to the skills that existing professionals need to operate in transnational and international markets. The Training Actions also complement national support for skills development, which does not incorporate a transnational dimension to the same extent. Synergies and complementarities exist with Access to Market Actions although there is a risk of overlap, as both types of Action support provision of skills and support access to international professional markets, albeit with different degrees of emphasis on each. There are instances of synergies "on the ground" whereby participants in Training Actions are supported to pitch at Access to Market events. There are also instances of beneficiaries receiving funding for Training Actions and Access to Market Actions and implementing them in such a way as to promote synergies, although there has been confusion amongst some applicants as to which Action they should apply.

There is a need to make the MEDIA Training Actions sustainable without EU funding and to make the MEDIA "approach" to training more widely available. The MEDIA approach to training is unique and effective and demand for places exceeds the supply. But there is limited evidence of training providers repeating/expanding Training Actions without EU support. Similarly, there is limited evidence of the MEDIA approach being mainstreamed within wider education system(s) for the sector. The total volume of participants thus remains relatively low – reflecting the modest sums of money available from this part of the Creative Europe Programme. Reflection is therefore needed on how to sustain and mainstream the MEDIA approach, i.e. in the sector and/or in national education and training systems. Without this, impact will remain modest and be limited to direct participants (low volume). The long-term aim should be to "internationalise" the audiovisual training offer, perhaps in the same way that Erasmus has helped to internationalise higher education over the last 30 years or so.

There is a need to consider what "model" will facilitate the sustainability, expansion and mainstreaming of transnational training for audiovisual professionals. These models could include: i) "mixed": continued subsidies to create Training Actions complemented by scholarships for certain professionals; ii) "supply-driven: discontinuation of scholarships, with more funding committed to establishing a larger number of Training Actions; iii) "demand-driven": diversion of more/all Training Action funds into scholarships, enabling participants to select the Training Action of their choice; iv) "pump-priming": initial funding to establish Training Actions which then become self-sustaining on a commercial basis in the long-run (perhaps with scholarships continuing). A MEDIA accreditation or quality mark could be considered for approved Training Actions. Those Actions could then receive trainees with scholarships from MEDIA or other sources, as well as paying participants.

Training Actions have demonstrated that skills development need not be a discrete activity but can be effectively integrated into the process of creating, producing and distributing audiovisual works. This creates the possibility of new forms of support for

skills development within Creative Europe. It might be possible to integrate support for the development of individuals' skills within European co-production funding available from the MEDIA Sub-programme. Alternatively, (some) Training Actions could be allowed to focus more explicitly on the process of creating and producing new works and taking them to market.

Recommendations

Strategic recommendations for the current period

1. The MEDIA Sub-programme should **continue to provide support for the Training Actions**, given the need for such support in the audiovisual sector, the demand expressed by applicants and the effectiveness of the Training Actions to date. The selection criteria should continue to prioritise Training Actions with broadly similar characteristics to those supported in the current programming period. Innovation should continue to feature as a topic in itself and as a feature of other topics, e.g. skills in using innovative forms of production or new technologies' or in adopting innovative forms of financing.

2. The Commission and the EACEA should **promote wider change in the training available for audiovisual professionals by disseminating policy lessons** targeted at national policymakers and sector stakeholders. Such policy lessons would relate to the potential of training to address current industry needs by adopting an approach that is transnational, multi-disciplinary or multi-sectoral, relational and personalised, project-based, focused on delivering tangible end-products and concrete outcomes and supportive of professional networking.

3. The Commission and the EACEA should **explore ways to promote the sustainability of the Training Actions on a commercial basis** as one possible means of ensuring their sustainability. This could be done through further consultations of the Training Actions and of sector stakeholders and through the dissemination of good practice, for example, through events organised by the European Commission.

4. The Commission and the EACEA should **consider calls for Training Actions that are dedicated to new or young professionals** with limited professional experience.

5. The Commission and the EACEA should consider **calls for proposals that combine Training Actions and Access to Market Actions** on a pilot basis. The experience of selected projects would then inform the design of any successor programme to Creative Europe.

Operational recommendations for the current period

6. The Commission and the EACEA should **consider the relative merits of allowing professionals to participate in training provided by more than one Training Action** (or that have participated in MEDIA-supported training in the previous period). One possibility would be for such participants to pay a fee broadly equivalent to the average cost per person of providing the training. The Commission and EACEA's choice in this matter will reflect the overall aim of the Training Actions; for example, if the aim is to maximise the number of

professionals supported, then this would suggest that repeat participations should be discouraged; if the aim is to provide more "holistic" in-depth support for professionals, then repeat participation would be desirable.

7. The EACEA should **provide greater clarity or information on the distinction between the Training Actions and the Access to Market Actions**, for example, through revising relevant sections of programme guidelines.

8. The Commission and the EACEA should **promote synergies between the Training Actions and loan guarantee facilities, including any supported by EU funds**. This could include networking between the Training Action co-ordinators and financial intermediaries. Training providers supported by the Training Actions could also be encouraged to refer participants to financial intermediaries.

9. The Commission and the EACEA should consider whether it is desirable to **require Training Actions to provide data on the level of demand** for their training courses on a consistent basis.

10. The Commission and the EACEA should consider whether it is necessary to **require Training Actions to provide information about the availability of and results of training to the Creative Europe Desks** on a more consistent basis. This would help make professionals in low capacity countries more aware of training courses and increase transparency regarding EU support for Training Actions.

Recommendations for the next period

11. The Commission should **clarify the overall aim of the Training Actions**, i.e. whether the intention is to support pilot projects that are then sustained on a commercial basis or with other funding or to support a large number of participants (which would require an increase in EU funding) or to internationalise the sector's training offer more generally.

12. The Commission should **consider what model of support for training for audiovisual professionals is most appropriate** in the next period. The current "mixed" model could be continued or it could be replaced by a wholly "demand-driven", a wholly "supply-driven" or a "pump-priming" approach.

13. The Commission should **consider creating a MEDIA Training Action quality mark**, which would be acquired by training courses satisfying certain "essential requirements", whether supported by EU funds or not. Amongst other things, such training courses would be eligible to host participants in receipt of Creative Europe scholarships.

14. The Commission should **consider whether Training Actions should be allowed or required to focus more explicitly on the process of creating and producing new works and taking them to market**.

15. The Commission should **consider clarifying the distinction between the Training Actions with the Access to Market Actions** or creating possibilities for projects that involve both types of activity.

16. The Commission should **consider increasing the possibilities for training or mentoring to be integrated into other forms of support available under Creative Europe**.

17. The Commission should **consider whether the Training Actions merit replication as a discrete strand within any successor to the current Erasmus+ programme**, for all sectors not only the audiovisual sector. As in MEDIA, training for professionals would address current industry needs by adopting an approach that is transnational, multi-disciplinary or multi-sectoral, relational and personalised, project-based, focused on delivering tangible end-products and concrete outcomes and supportive of professional networking.

RÉSUMÉ ANALYTIQUE

Introduction

Ce rapport présente les conclusions de l'étude sur la contribution du programme Europe créative à la promotion de la créativité et du perfectionnement des compétences des professionnels de l'audiovisuel. Cette étude a été entreprise par le Centre for Strategy and Evaluation Services (CSES) et IDEA Consult, au nom de la Direction générale des réseaux de communication, du contenu et des technologies (DG CNECT) de la Commission européenne.

L'étude avait les objectifs principaux suivants : a) identifier les compétences nécessaires dans le secteur audiovisuel ; b) évaluer la pertinence, l'efficience et l'efficacité des actions de formation MEDIA actuelles pour combler le déficit des compétences ; et c) formuler des recommandations. Ces objectifs ont été poursuivis en collectant et en analysant des données extraites de sources multiples et notamment de publications, d'entretiens avec des parties prenantes au niveau de l'Union européenne et au niveau national, de la documentation du programme MEDIA, de documentation et de données de projets, d'entretiens de porteurs de projets et d'une enquête en ligne auprès des participants à la formation.

L'une des priorités du sous-programme MEDIA d'Europe créative est de faciliter l'acquisition et le renforcement des qualifications et compétences des professionnels de l'audiovisuel et le développement de réseaux. Il s'agit notamment de développer les capacités de gestion financière, d'encourager l'utilisation des technologies numériques afin d'assurer l'adaptation à l'évolution du marché et de tester de nouvelles méthodes de conquête de nouveaux publics et de nouveaux modèles économiques. À cette fin, le programme soutient les actions de formation MEDIA favorisant l'acquisition et le renforcement des qualifications et compétences des professionnels de l'audiovisuel, le partage des connaissances et les initiatives de constitution de réseaux, y compris l'intégration de technologies numériques, de modèles économiques innovants et de mécanismes de financement.

Les actions de formation se situent dans le prolongement du soutien que l'UE a apporté par le passé au secteur de l'audiovisuel, remontant au moins au programme MEDIA I (1991-95). Dans le cadre du sous-programme MEDIA actuel, les actions de formation prennent la forme d'ateliers et/ou de séances de coaching en ligne et d'outils de diffusion, en recourant à des méthodes d'apprentissage, d'enseignement et de coaching éprouvées ou nouvelles et à la diffusion des meilleures pratiques. Elles comprennent :

- actions européennes ayant pour but d'aider les professionnels à acquérir des aptitudes et compétences ou à les améliorer en vue d'une activité exercée principalement en Europe ; et

- actions internationales visant à renforcer l'expertise, les connaissances et les capacités des professionnels européens pour leur permettre d'échanger, de créer des réseaux et de collaborer avec les professionnels non européens, et d'accéder aux réseaux professionnels internationaux.

Analyse des besoins en compétences du secteur

Le secteur européen de l'audiovisuel est confronté à plusieurs défis qui se résument en quelques mots : s'adapter à la mondialisation, acquérir de nouvelles compétences face à la révolution numérique, et restructurer/redresser l'industrie audiovisuelle à la suite de la crise économique et financière. En ce qui concerne les compétences nécessaires, on prévoit dans un avenir proche ce qui suit :

- L'évolution rapide du numérique et des technologies continuera de créer un besoin de développer les métiers et les compétences techniques des professionnels. La nouveauté réside dans le fait que l'association de plusieurs compétences techniques, c'est-à-dire le multitâche, revêtira une importance grandissante en raison des coupes budgétaires et des progrès technologiques ;

- D'autres groupes de compétences, comme les compétences entrepreneuriales et en gestion par exemple, gagneront de l'importance. Étant donné que le secteur de l'audiovisuel se caractérise déjà par un grand nombre de microentreprises et de travailleurs indépendants et que leur nombre devrait augmenter, de plus en plus de professionnels de l'audiovisuel devront être en mesure de gérer leur propre activité ;

- Sachant que, dans le secteur de l'audiovisuel, le travail est habituellement axé autour de projets et que la sécurité de l'emploi diminue, les travailleurs devront de plus en plus développer leurs compétences de gestion de carrière afin de cumuler plusieurs missions pour préserver leur employabilité ;

- Du point de vue organisationnel, la sensibilisation à l'importance de la formation continuera de figurer au premier plan de l'ordre du jour politique, sachant qu'un grand nombre de travailleurs et leurs employeurs n'investissent pas (suffisamment) dans la formation.

Même si le marché unique de l'audiovisuel ne forme pas un tout (autrement dit, le marché européen de l'industrie audiovisuelle est fragmenté), dans la pratique certains professionnels de l'audiovisuel jouissent d'une présence indéniablement internationale. Afin de développer une présence sur la scène internationale et de surmonter les défis auxquels est confronté le secteur, il est essentiel de dispenser des formations visant à répondre aux besoins de compétences suivants :

- compétences propres aux métiers ;

- compétences associées aux TIC et au numérique ;

- compétences de gestion des affaires ;

- leadership, innovation et esprit d'entreprise ; et

- compétences interpersonnelles, sociales et interculturelles.

Activités et effet des actions de formation MEDIA

Les actions de formation ciblées par l'étude sont les actions sélectionnées par le biais du premier appel à propositions dans le cadre du programme-cadre Europe créative actuel (2014-2020). Cet appel à propositions a reçu 114 candidatures, représentant une enveloppe de financement totale de 16,84 millions d'euros. Parmi celles-ci, 58 ont finalement été financées, à hauteur de 7,98 millions d'euros. La plupart de ces actions de formation se poursuivront en deuxième année (c.-à-d. en 2015/16), sous réserve

de l'approbation des résultats de la première année (budget, programme de travail inclus) par l'Agence exécutive Éducation, Audiovisuel et Culture » (EACEA).

Les actions de formation sont dirigées par des organismes de 17 pays. La plupart d'entre elles (34) sont menées par des organismes situés dans les plus grands pays de l'UE et disposant des secteurs de l'audiovisuel les plus développés (France, Allemagne, Italie et Royaume-Uni). La situation géographique des activités de formation est plus diverse. En effet, ces formations se déroulent dans 33 pays, dont 23 États membres de l'Union européenne et 10 autres pays (Argentine, Canada et États-Unis par exemple). Cinq d'entre elles sont des actions internationales de soutien aux ressortissants nationaux de pays ne participant pas au programme Europe créative.

L'« approche » des actions de formation est unique, fortement appréciée et efficace. Les retours d'information des participants et d'autres parties prenantes sont systématiquement positifs quant à la qualité et à l'efficacité des actions. Comme prévu, les actions de formation sont très diverses en termes de contenu, de format et de participation. Elles n'en présentent pas moins certaines caractéristiques communes, qui contribuent à leur efficacité. Elles sont notamment actualisées, transnationales, multidisciplinaires ou multisectorielles, fortement relationnelles et personnalisées, axées sur des projets, orientées vers la réalisation de produits finaux tangibles et l'obtention de résultats concrets, et soutenant la création de réseaux professionnels.

Les actions de formation MEDIA sont diverses en termes de contenu et de compétences fournies. Bien que chaque action soit sélectionnée sur la base de ses mérites propres, la sélection globale des actions de formation est diverse et répond à une série de besoins de compétences du secteur. Elles servent divers métiers et maillons de la chaîne de valeur. Les participants ne manquant habituellement pas de compétences numériques, l'accent est mis sur l'acquisition des qualifications nécessaires pour travailler dans un environnement numérique en évolution rapide, plus que sur la mise à disposition de compétences numériques proprement dites. Ces actions peuvent également répondre aux besoins de professionnels non audiovisuels travaillant dans ce secteur, comme les professionnels de la finance et du droit.

Les participants aux actions de formation MEDIA sont variés, ce qui reflète essentiellement les intentions du programme, mais le nombre total des participants reste faible étant donné les limites du budget de financement. Le nombre de candidats souhaitant participer aux actions de formation dépasse généralement le nombre de places disponibles (sachant toutefois que la méthode de sélection des participants varie et que des données cohérentes ne sont pas collectées sur le niveau global de candidatures). Les participants sont des professionnels actifs dans l'industrie, justifiant habituellement d'au moins cinq ans d'expérience et possédant des ambitions ou idées de projet qu'ils souhaitent développer. Les participants exercent des professions/métiers d'une grande variété. La répartition entre hommes et femmes parmi les participants est bien équilibrée. Il y a un nombre quasiment égal d'hommes et de femmes sur l'ensemble des actions de formation. Cet équilibre ne reflète pas le secteur audiovisuel dans son ensemble, puisque les femmes y sont sous-représentées.

Il y a une diversité de nationalités et de pays accueillant une action de formation, que ce soit pour une formation en particulier ou pour les formations dans leur ensemble. Les actions de formations incluent également de nombreux professionnels provenant de pays à faibles capacités de production et de pays en-dehors de l'UE. Les pays disposant de capacités de production audiovisuelle fortes ou moyennes ne sont pas

surreprésentés parmi les participants (par rapport à la taille de leurs populations respectives) alors que certains pays à faibles capacités, mais pas tous, sont bien représentés. Certains indices semblent néanmoins indiquer qu'un nombre important de participants assistent à plusieurs actions de formation. Les jeunes professionnels et les débutants, dont l'expérience est limitée, ont tendance à ne pas pouvoir profiter d'actions de formation qui, par définition, ciblent principalement les professionnels existants.

Les actions de formation MEDIA ont l'impact attendu sur les participants. Les taux de satisfaction sont constamment élevés. Ceux-ci bénéficient, entre autres, de compétences nouvelles ou renforcées en adéquation avec les besoins du marché, dont notamment : des compétences propres à leurs métiers ; des compétences de maîtrise des impératifs de l'environnement numérique ; des compétences commerciales, de leadership et de gestion, ainsi que des compétences interpersonnelles et interculturelles ; une plus grande capacité d'intervention à l'échelle internationale ; l'amélioration de l'accès aux marchés et dans certains cas, de vraies opportunités de présenter un argumentaire en faveur de nouvelles œuvres et de nouveaux contrats ou d'une demande de financement ; et l'établissement efficace de contacts et de réseaux perdurant au-delà de la participation à l'action de formation.

Analyse « pédagogique » des actions de formation

Les conclusions de l'étude montrent que des efforts considérables sont faits pour faire en sorte que les actions de formation répondent aux besoins existants. Les objectifs, les orientations et le contenu des actions de formation sont généralement déterminés par des professionnels de l'industrie, en principe très expérimentés. D'autre part, les actions de formation sont mises à jour chaque année pour tenir compte de l'évolution de l'industrie, ainsi que des besoins de chaque nouveau groupe de participants. Dans la plupart ou un grand nombre de cas, la technologie et le passage au numérique font partie intégrante des actions de formation. Cette intégration se manifeste de diverses façons et notamment par l'utilisation des technologies à des fins de création, de production et de diffusion, par de nouveaux modèles économiques pour faire face à l'arrivée du numérique et par le recours à la technologie pour dispenser l'apprentissage.

Les actions de formation ont tendance à cibler un petit nombre de participants sélectionnés avec soin afin de leur fournir un soutien en profondeur, plutôt que d'en cibler un plus grand nombre de manière plus superficielle. Les participants sont sélectionnés dans une optique de diversité, mais la nature de cette diversité varie. Pour certains projets, les participants proviennent de différents maillons de la chaîne de valeur alors que, pour d'autres, ils proviennent de différents secteurs ou de différentes professions. Quoi qu'il en soit, les nationalités y sont diversement représentées. Les actions de formation attirent principalement les participants par le bouche à oreille ou par le biais de réseaux professionnels. Dans certains cas, le nombre de candidats dépasse le nombre de places offertes. Le plus souvent, avant le recrutement aux actions de formation, les candidats sont soumis à une « procédure de sélection » pour s'assurer qu'il s'agit bien de ceux qui devraient normalement retirer le maximum de la formation et pour orienter les spécificités de conception et de contenu de la formation. Les formateurs et experts proviennent de divers pays européens et non européens, mais aussi de différentes professions du secteur.

Malgré la diversité considérable des types de formations proposés, les actions de formation sont principalement résidentielles et sous forme de face-à-face. En effet, ce format est essentiel pour apporter un soutien approfondi et personnalisé et pour faciliter la mise en réseau. L'apprentissage électronique et en ligne est très utilisé, mais seulement comme mécanisme complémentaire ou de suivi des séances en face-à-face. Par conséquent, les actions de formation innovent non pas parce qu'elles expérimentent de nouvelles pédagogies ou des formes novatrices de dispenser la formation, mais plutôt dans leur manière d'apporter un soutien et de tenir compte de l'évolution actuelle de l'industrie.

La formation est hautement personnalisée, individualisée et par conséquent, relationnelle. Elle met très fortement l'accent sur la collaboration avec les participants et les experts travaillant dans le domaine en question. D'autre part, elle est très souvent fondée sur le développement de projets c'est-à-dire que les participants travaillent sur leurs projets personnels ou d'entreprise, tels que de nouveaux scénarios ou de nouvelles productions, l'action de formation visant à les aider à les développer et au final, à les commercialiser. Dans ce contexte, le suivi est crucial et se présente sous diverses formes afin, non seulement de maximiser l'impact de la formation, mais aussi d'identifier les réussites et de tirer les enseignements qui permettront d'orienter les prochaines activités.

La diffusion des résultats est un élément essentiel des actions de formation et se déroule de nombreuses façons. La plupart des projets font appel aux brochures/supports imprimés, sites Internet, médias sociaux, festivals, etc. Les résultats des actions de formation ont déjà été présentés dans le cadre de festivals et d'autres événements, mais les actions de formation ont également donné suite à la diffusion de produits tangibles, notamment des œuvres audiovisuelles ou des outils et supports de formation. Bien que certaines actions de formation présentent des passerelles avec d'autres industries culturelles et créatives, la plupart d'entre elles ne jouent qu'un rôle mineur dans la promotion de ces passerelles, dont la plupart interviennent au sein du secteur de l'audiovisuel (financiers et juridiques inclus) plutôt qu'avec d'autres secteurs.

Pertinence et valeur ajoutée européenne

Les actions de formation MEDIA répondent aux besoins des professionnels de l'industrie audiovisuelle. Le processus de sélection donne un degré de priorité élevé aux projets se rapportant à des besoins connus, sans toutefois se vouloir trop normatif. Les prestataires de formation peuvent mettre au point des formations répondant aux besoins de qualifications qu'ils ont identifiés, dans un marché dynamique et en évolution rapide. Par conséquent, les actions de formation répondent aux besoins de compétences d'une importance fondamentale, comme les besoins suivants des professionnels de l'audiovisuel : mettre à jour constamment leurs compétences métiers/techniques à la lumière des progrès technologiques ou de l'importance de la polyvalence ; acquérir des compétences entrepreneuriales et de gestion d'entreprise ; développer des compétences de gestion de carrière basées sur le besoin de travailler par projets (dans un environnement précaire) et d'apprendre comment commercialiser les œuvres ; et développer de nouveaux modèles économiques et de nouvelles façons de monétiser les contenus dans l'environnement numérique.

Les actions de formation MEDIA sont une source unique de valeur ajoutée européenne. Elles se distinguent du soutien à l'enseignement supérieur et à la formation professionnelle, proposé dans le cadre du programme Erasmus+, qui n'organise aucune formation se rapportant directement aux compétences dont ont besoin les professionnels pour faire leur métier dans les marchés transnationaux et internationaux. En outre les actions de formation complètent le soutien national au développement des compétences, qui n'incorpore pas une dimension transnationale au même titre. Des synergies et complémentarités existent avec les actions d'accès au marché. Un risque de chevauchement est toutefois possible, dans la mesure où les deux types d'actions soutiennent la mise à disposition de compétences et l'accès aux marchés professionnels internationaux, même s'ils leur accordent individuellement un degré d'importance différent. Des synergies existent également « sur le terrain », des participants aux actions de formation recevant un soutien pour présenter leur argumentaire à l'occasion d'événements d'accès aux marchés. Il existe aussi des exemples de bénéficiaires qui reçoivent des subventions pour des actions de formation et des actions d'accès aux marchés et qui les utilisent pour promouvoir des synergies, mais certains candidats ont été désorientés, ne sachant pas quel type d'action demander.

Il est nécessaire de pérenniser l'"approche" de formation MEDIA et de la rendre plus largement disponible. L'approche de formation MEDIA est à la fois unique et efficace. Le nombre de candidats dépasse le nombre de places offertes. Peu d'indices semblent néanmoins indiquer que les prestataires de formations répètent et/ou développent les actions de formation sans le financement de l'UE. De même, rien ne semble confirmer l'intégration irréfutable de l'approche MEDIA dans le(s) système(s) éducatif(s) plus généraux du secteur. Le nombre total de participants reste par conséquent relativement faible, reflétant les sommes d'argent modestes accordées à ce volet du programme Europe créative. Une réflexion s'impose donc pour déterminer le moyen de pérenniser et d'intégrer l'approche MEDIA, aussi bien dans le secteur que dans l'éducation nationale et dans les systèmes de formation. Sans cette intégration, son impact restera modeste et limité aux participants directs (en faible nombre). Son but à long terme devrait être l' « internationalisation » de l'offre de formation audiovisuelle, de la même manière peut-être qu'Erasmus contribue à l'internationalisation de l'éducation supérieure depuis environ 30 ans.

Il faut se poser la question de savoir quel « modèle » facilitera la pérennisation, l'expansion et l'intégration de la formation transnationale destinée aux professionnels de l'audiovisuel. Il pourrait notamment s'agir d'un modèle : i) « mixte » : subventions continues pour créer des actions de formation, complétées par des bourses accordées à certains professionnels ; ii) « déterminé par l'offre » : suppression des bourses et somme plus importante consacrée à la création d'un plus grand nombre d'actions de formation ; ii) « déterminé par la demande » : réaffectation d'une partie/de la totalité de l'enveloppe destinée aux actions de formation à des « bourses MEDIA », pour permettre aux professionnels de sélectionner l'action de formation de leur choix ; iv) « mobilisateur » : financement initial pour établir les actions de formation qui, à long terme, deviennent commercialement autonomes (dans le cadre d'une bourse continue, éventuellement). Une accréditation ou une marque de qualité MEDIA serait envisageable pour les actions de formation agréées. Ces actions pourraient alors viser des participants boursiers provenant de MEDIA ou d'autres sources, ainsi que des participants payants.

Les actions de formation ont montré que le développement des compétences ne doit pas nécessairement être une activité distincte, mais qu'elle peut s'intégrer efficacement au processus de création, de production et de distribution des œuvres audiovisuelles. De nouvelles formes de soutien au développement des compétences pourraient donc être développées au sein du programme Europe créative. Il serait peut-être possible d'intégrer le soutien au développement des compétences individuelles dans le financement de coproduction européen, disponible dans le cadre du sous-programme MEDIA. Autre solution, les actions de formation, ou une partie d'entre elles, pourraient être autorisées à cibler plus explicitement le processus de création et de production de nouvelles œuvres, ainsi que leur commercialisation.

Recommandations

Recommandations stratégiques pour la période en cours

1. Le sous-programme MEDIA devrait **continuer à soutenir les actions de formation**, étant donné le besoin pour un tel soutien dans le secteur de l'audiovisuel, la demande exprimée par les candidats aux formations et l'efficacité des actions de formation entreprises jusqu'à maintenant. Les critères de sélection doivent continuer à accorder la priorité aux actions de formation dont les caractéristiques sont sensiblement les mêmes que celles que soutient la programmation en cours. L'innovation doit continuer à y figurer en tant que thème à part entière et en tant qu'élément d'autres thèmes, par ex. les compétences d'utilisation de formes innovantes de production ou de nouvelles technologies ou l'adoption de formes de financement innovantes.

2. La Commission et l'Agence exécutive Éducation, Audiovisuel et Culture (EACEA) devraient **promouvoir une transformation plus étendue de la formation disponible aux professionnels de l'audiovisuel, en disséminant des enseignements politiques** ciblant les décideurs et les parties prenantes du secteur. Ces enseignements concerneraient la capacité potentielle de la formation à répondre aux besoins actuels de l'industrie, en adoptant une approche transnationale, multidisciplinaire ou multisectorielle, relationnelle et personnalisée, axée sur les projets, orientée vers la réalisation de produits finaux tangibles et l'obtention de résultats concrets et favorable à la constitution de réseaux professionnels.

3. La Commission et l'Agence exécutive Éducation, Audiovisuel et Culture (EACEA) devraient **chercher des moyens de promouvoir la pérennisation des actions de formation sur une base commerciale**, ce qui pourrait représenter une manière de pérenniser ces actions, et ce grâce à d'autres consultations impliquant les actions de formation et les parties prenantes du secteur, et à la dissémination de bonnes pratiques à l'occasion d'événements organisés par la Commission européenne, par exemple.

4. La Commission et l'Agence exécutive Éducation, Audiovisuel et Culture (EACEA) devraient **envisager des appels aux actions de formation, destinés aux professionnels jeunes ou nouveaux** ne disposant que d'une expérience professionnelle limitée.

5. La Commission et l'Agence exécutive Éducation, Audiovisuel et Culture (EACEA) devraient envisager des **appels à propositions combinant les actions de formation et les actions d'accès** aux marchés, à titre de projets pilotes.

L'expérience tirée des projets sélectionnés permettrait alors d'orienter la conception de tout programme venant succéder à Europe créative.

Recommandations opérationnelles pour la période en cours

6. La Commission et l'Agence exécutive Éducation, Audiovisuel et Culture (EACEA) devraient **évaluer les mérites relatifs de la décision d'autoriser les professionnels à participer à des stages fournis par plusieurs actions de formation** (ou les professionnels ayant déjà participé à une formation MEDIA au cours de la période précédente). Une solution possible consisterait à demander à ces participants de verser des droits d'inscription globalement équivalents au coût moyen par personne de prestation de la formation. La décision de la Commission et de l'EACEA en la matière reflèterait l'objectif global des actions de formation. Par exemple, si l'objectif de la formation est de maximiser le nombre de professionnels bénéficiaires, il serait peut-être bon de décourager les participations récurrentes. Par contre, celles-ci seront souhaitables si l'objectif de la formation est d'apporter aux professionnels un soutien approfondi plus « holistique ».

7. La Commission et l'Agence exécutive Éducation, Audiovisuel et Culture (EACEA) devraient **définir plus clairement ou plus précisément la différence entre les actions de formation et les actions d'accès aux marchés**, en révisant les chapitres concernés des lignes directrices du programme, par exemple.

8. La Commission et l'Agence exécutive Éducation, Audiovisuel et Culture (EACEA) devraient **promouvoir les synergies entre les actions de formation et les modalités de garantie de prêt, y compris celles soutenues par des fonds de l'Union européenne**. Il pourrait notamment s'agir de constituer un réseau entre les coordinateurs de l'action de formation et les intermédiaires financiers. Les prestataires de formation soutenus par les actions de formation pourraient aussi être encouragés à diriger les participants vers des intermédiaires financiers.

9. La Commission et l'Agence exécutive Éducation, Audiovisuel et Culture (EACEA) devraient déterminer s'il serait souhaitable d'**exiger que les actions de formation fournissent régulièrement des données sur le niveau de la demande** exprimée en faveur de leurs stages de formation.

10. La Commission et l'Agence exécutive Éducation, Audiovisuel et Culture (EACEA) devraient déterminer s'il est nécessaire d'**exiger que les actions de formation fournissent plus régulièrement des informations sur la disponibilité et les résultats des formations, aux desks « Europe créative »**. Cette information aiderait les professionnels des pays à faibles capacités à mieux connaître les stages de formation disponibles et augmenterait la transparence du soutien de l'Union européenne aux actions de formation.

Recommandations pour la prochaine période

11. La Commission devrait **préciser l'objectif global des actions de formation**, à savoir si elles sont destinées à soutenir des projets pilotes devant ensuite être poursuivis sur une base commerciale ou au moyen d'un autre type de financement, à soutenir un grand nombre de participants (option qui obligerait à augmenter le financement de l'UE) ou à internationaliser plus généralement l'offre de formation.

12. La Commission devrait aussi **déterminer quel modèle de soutien à la formation des professionnels de l'audiovisuel serait le plus approprié** au cours de la prochaine période. Le modèle « mixte » actuel pourrait être conservé ou remplacé par un modèle entièrement « déterminé par la demande », entièrement « déterminé par l'offre » ou « mobilisateur ». L'adoption du modèle « déterminé par la demande » obligerait à créer des « bourses MEDIA » à l'intention des professionnels de l'audiovisuel.

13. La Commission devrait **envisager de créer une marque de qualité de l'action de formation MEDIA,** laquelle serait accordée aux stages de formation ayant satisfait certains « impératifs essentiels », qu'ils aient bénéficié d'une subvention de l'UE ou non. Entre autres, ces stages de formation auraient le droit d'accueillir des participants titulaires d'une « bourse MEDIA » (si ces bourses étaient créées dans le cadre du modèle « déterminé par la demande »).

14. La Commission devrait **déterminer si les actions de formation pourraient ou devraient cibler plus explicitement le processus de création et de production de nouvelles œuvres, ainsi que leur commercialisation**.

15. La Commission devrait **envisager de préciser la différence entre les actions de formation et les actions d'accès aux marchés**, ou de créer des possibilités pour les projets couvrant ces deux types d'activités.

16. La Commission devrait **envisager d'augmenter les possibilités d'intégration de la formation ou du mentorat à d'autres formes de soutien proposées dans le cadre du programme Europe créative**.

16. La Commission devrait **déterminer si les actions de formation méritent d'être reproduites à titre de branche distincte du successeur du programme Erasmus+ actuel** et ce pour tous les secteurs, pas seulement pour le secteur de l'audiovisuel. Comme dans le cadre du sous-programme MEDIA, la formation des professionnels répondrait aux besoins actuels de l'industrie, en adoptant une approche transnationale, multidisciplinaire ou multisectorielle, relationnelle et personnalisée, axée sur des projets, orientée vers la réalisation de produits finaux tangibles et l'obtention de résultats concrets, et favorable à la constitution de réseaux professionnels.

1.0 INTRODUCTION

This report presents the findings for the study on the **Contribution of the Creative Europe Programme to fostering Creativity and Skills Development in the Audiovisual Sector**. The study has been undertaken by the Centre for Strategy and Evaluation Services (CSES) and IDEA Consult on behalf of the European Commission Directorate-General for Communications Networks, Content and Technology (DG CNECT).

1.1 Training Actions

One of the priorities of the Creative Europe MEDIA Sub-programme is to facilitate the acquisition and improvement of skills and competences of audiovisual professionals and the development of networks. These skills include financial management and the use of digital technologies to ensure the adaptation to market development, testing new approaches to audience development and testing of new business models. To that end, the programme provides support for Training Actions promoting the acquisition and improvement of skills and competences by audiovisual professionals, knowledge-sharing and networking initiatives, including the integration of digital technologies, innovative business models and financing.

Training Actions include:

- European actions aimed at the acquisition and improvement of skills and competences for professionals to operate mainly in Europe; and

- International actions aimed at building expertise, knowledge and capacities for European professionals to network and collaborate with non-European professionals to enable access to international professional networks.

These measures may take the form of workshops and/or on-line coaching sessions and dissemination tools by using proven or testing new learning, teaching and coaching methods and best practice dissemination.

1.2 Purpose and focus of the study

The main objectives of the study have been to: a) identify the skills needed in the audiovisual sector; b) evaluate the relevance, efficiency and effectiveness of the current Training Actions in contributing to closing skills gaps; and c) formulate recommendations.

These objectives have been pursued through research and analysis related to a number of tasks, as specified in the Terms of Reference (ToR) for the study (see Annex Four). The eleven sub-tasks in the ToR were grouped into five Main Tasks, as shown in the table below.

The Training Actions that formed the focus of the study were those selected via the first call for proposals within the current Creative Europe Programme (2014-2020).

Table 1.1 Main tasks undertaken by the study and data sources

Main Tasks	Sub-tasks	Data sources
Task 1: Analysis of skill needs in the audiovisual sector	• Identify skills needed for a successful European audiovisual sector in view of current and future challenges	• Secondary data (literature, studies, raw data) • Interviews of EU / national operators
Task 2: Analysis of activities and effects of Training Actions	• Provide mapping of Training Actions in terms of topic taught and geographical area in view of evaluating consistency and coverage • Analyse current training activities with non-EU international dimension • Evaluate the benefits of training courses in terms of capacity building, networking, etc. • Estimate the cost of existing Training programmes per day and per participant • Effects of the "level playing field" and scholarships (e.g. any imbalance in participants from low capacity countries)	• MEDIA programme documentation • Primary data (interviews, survey) • Project documentation on MEDIA Training Actions

Task 3: Pedagogical analysis of teaching, opportunities for dissemination, room for improvement, bridges and cross-over, and adoption of best practice	• Estimate relevance, efficiency and effectiveness of current teaching methods:
	  ▪ Identify opportunities for dissemination of results and opening up of audience via distribution of course material, online platforms, etc.
	  ▪ Identify room for improvement in terms of the delivery of training courses: format, audience, pedagogical methods
	• Identify potential bridges and cross-over opportunities between the audiovisual sector and other sectors as defined in Article 2 of the Creative Europe Programme Regulation
	• Research best practice outside EU
		• MEDIA programme documentation
		• Primary data (interviews, survey)
		• Project documentation on MEDIA Training Actions

Task 4: Analysis of European added-value of Training Actions	• Compare topics covered by current training activities with needs identified in Task 1 and comment on the balanced nature of programme selection with regards to these needs • Compare topics covered by the current training activities to those in the guidelines for Training Actions	• MEDIA programme documentation • Secondary data (existing literature, studies, raw data) • Documentation regarding non-EU best practice • Interviews of EU /

Main Tasks	Sub-tasks	Data sources
	• Estimate relevance and European added-value of teaching these topics with regards to the overall & specific objectives of Creative Europe	national operators
Task 5: Analysis of synergies with Access to Market Actions	• Evaluate the contribution of Access to Market activities to the skills needs identified in Task 1 • Explore synergies between Training and Access to Market actions. Make suggestions for the exploitation of synergies between projects within both the current Training offer and the Training & Access to Markets activities • Evaluate benefits of holding both Training & Access to Market activities at the same place and time in terms of efficiency and complementarity • Analyse activities of beneficiaries who provide both Training and Access to Market actions	• Primary data (interviews, survey) • MEDIA programme documentation • Project documentation on MEDIA Training Actions

The main data collection tools included:

- Survey of participants: carried out between 20 June and 11 July 2016. The survey was open to participants in Training Actions, as well as experts invited to training courses. It received a total of 639 responses, of which 74% completed the whole questionnaire. The survey questionnaire is available in Annex One.

- Interviews of training providers implementing the Training Actions, as well as with other stakeholders. The list of interviewees is provided in Annex Two.

- Review of programme and project documentation and other literature. A bibliography is provided in Annex Three.

- Case studies of a selection of projects.

Analysis of data collected via these tools forms the basis for the findings presented in this report. The findings are presented in Sections 2 to 8 as follows:

- **Section 2** provides an overview of the subject area, the rationale for EU intervention and a summary of past evaluations of MEDIA training.

- **Section 3** provides a more in-depth discussion on the challenges facing the audiovisual sector, focusing in particular on skills needs and skills gaps.

- **Sections 4-7** contain the findings of the evaluative elements of the study, describing the activities and effects, pedagogical elements, European Added Value and the synergies between Training Actions and Access to Market Actions respectively.

- **Section 8** contains the study conclusions and recommendations.

Annexes contain the questionnaire for the on-line survey, the list of interviews undertaken, a bibliography and the Terms of Reference (ToR) for the study.

The report makes frequent use of the term '**stakeholders'**. This refers to bodies within the audiovisual sector generally, who may operate at national or EU level (or both) within the sector and its sub-sectors, such as the games industry. When the report refers to '**participants'**, it is specifically referring to professionals who have participated in one or more training courses provided by the MEDIA Training Actions with support from the Creative Europe Programme. When the report mentions '**beneficiaries' '**project promoters**' or '**training providers**', it is referring to the organisations that have applied for and received funding for MEDIA Training Actions.

2.0   CONTEXT FOR THE STUDY

2.1   Trends and emerging challenges facing the European audiovisual sector

Over the last decade, the context in which professionals in the audiovisual sector in Europe operate has changed considerably. Three trends in particular have had a profound impact on the audiovisual sector and are expected to continue challenging businesses in the future: globalisation, the digital revolution and the economic and financial crisis.

2.1.1   Globalisation

Globalisation affects (and will continue to affect) the European audiovisual sector in different ways:

- Firstly, global competition increases with further trade liberalisation. New international audiovisual operators have entered the European market and new global markets open up for European audiovisual operators and productions. This implies that international distribution and promotion of audiovisual productions require increased attention.

- Secondly, increased migration has greatly expanded the cultural diversity of the European population. The increased cultural diversity and influences from other cultures bring new perspectives and new narratives into the audiovisual sector. Migration also provides opportunities for more international co-production and exchange. At the same time, it poses challenges to reach an increasingly diverse audience, raising the need for cross-cultural competences.

2.1.2   Digital revolution

By far the largest impact on the audiovisual business comes from the digital revolution, which fundamentally affects every part of the audiovisual value chain as well as its interaction with the audience:

- New players have entered the audiovisual sector (e.g. video-on-demand platforms, internet platforms, telecommunication operators) and the full manifestation of this trend has only just started to materialise;

- New 'tools', such as 3D images and animation or immersive technology applications, provide new audiovisual production opportunities;

- The possibilities and flexibility for distribution have substantially increased, as has the complexity of distribution;

- Digitisation has a major impact on audience behaviour. People can watch content 'anytime, anywhere and on every device'. Moreover, there is increased co-creation with the public on content as well as programming;

- There is a blurring of boundaries between different creative industry sub-sectors;

- Digitisation has led to changing roles in the audiovisual production chain, with large corporations no longer having a monopoly on control of the production chain. Digital technology allows small and micro-enterprises to take up other tasks/different roles in the audiovisual production chain; and

- The management of intellectual property rights has become considerably more complex and, in some instances, has posed significant challenges to traditional business models.

2.1.3 Economic and financial crisis

Finally, the economic and financial crisis has been an important driver of change for the European audiovisual sector:

- Across Europe, the crisis has put pressure on budgets for public funding of culture, including for audiovisual production. Moreover, banks have become (even) more risk-averse, limiting access to finance for many audiovisual organisations. At the same time, the crisis (in combination with technological evolutions) has led to an increased diversity of financial players and alternative financial instruments, such as microfinance, crowdfunding or venture philanthropy. Getting an audiovisual project financed increasingly requires specialised (financial) knowledge.

- The economic and financial crisis has also increased pressure on audiovisual players to further professionalise their business and increase the multiplier effect of grants received through increased entrepreneurship. Beyond creative capabilities, audiovisual players are increasingly expected to also master entrepreneurial and managerial capabilities.

2.2 Rationale for policy intervention in the audiovisual sector

A competitive and culturally diverse single market for (digital) audiovisual content is high on the European policy agenda. It is one of the key objectives of the Europe 2020 Strategy,[1] the Digital Agenda for Europe[2] and the European Agenda for Culture.[3] Supporting the European audiovisual sector to overcome the different barriers to internationalisation positively contributes to boosting the competitiveness of the industry (economic rationale) and increased cultural diversity (cultural rationale) and thus to realising the objectives of EU policy. Article 5 of the Creative Europe Regulation stipulates that the programme should "support actions and activities with a European added value in the cultural and creative sectors. It shall contribute to the achievement of the objectives of the Europe 2020 Strategy and its flagship initiatives."

For the Training Actions supported by the MEDIA programme, it is important to emphasise the remit of the EU and of the Creative Europe countries respectively in order to put the recommendations of the study in the wider context of the industry. As this report (as well as other literature) notes, the level of audiovisual capacity varies considerably across the European countries. This unevenness in capacity becomes a challenge at European level insofar as the Creative Europe Programme has the objective to "safeguard, develop and promote European cultural and linguistic

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[1] Europe 2020: A European strategy for smart, sustainable and inclusive growth, 3 March 2010, COM(2010) 2020 and Conclusions from the European Council adopted on 17 June 2010

[2] Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: A Digital Agenda for Europe; Brussels, 19 May 2010, COM(2010)245

[3] Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on a European agenda for culture in a globalizing world, COM(2007) 242 final, Brussels 10 May 2007

diversity, to promote Europe's cultural heritage" which to an extent includes the nurturing and encouragement of emerging countries' audiovisual sectors. At the same time, the main responsibility for providing education and training remains with the Member States.

2.2.1 Economic rationale for intervention

The European audiovisual sector has the potential to play a significant role in achieving the different strategic objectives set out in the Europe 2020 Strategy:

- The rate of employment growth in the sector has been higher than the average rate for the rest of the economy in recent years (typically, 2% compared to 1% in most years).

- The sector can positively contribute to the further development of a knowledge-based economy.

- Cultural content plays a crucial role in the development of the information society, fuelling investments in broadband infrastructures and services, in digital technologies, as well as in new consumer electronics and telecommunication devices.

- Beyond their direct contribution to GDP, the cultural and creative industries (CCIs) are also important drivers of economic and social innovation in many other sectors.

As the Green Paper on the cultural and creative industries (CCIs) points out, Europe will only exploit the huge potential of CCIs (such as the audiovisual sector) if it (further) stimulates the industry to overcome barriers to increased competitiveness. For any industry to be competitive, a strong international performance is key. In that sense, the Green Paper states that "[…] Nurturing world-class cultural and creative industries, and exporting their works, products and services obviously entails developing links with third countries. SMEs in particular require support to establish contacts [internationally] and to have their activities promoted abroad. […]". Also the promotion of international mobility is seen as a strong enabler of a more competitive audiovisual sector: "[…] Promoting the mobility of artists and cultural practitioners contributes significantly to their professional skills and/or artistic development, developing their own research and exploration ambitions, opening up new market opportunities and enhancing their career possibilities in particular through their participation in residencies, festivals, live touring performances, international exhibitions or literary events […] Promoting the mobility of artists and cultural practitioners is a way to help our CCIs make the leap from local to global, and ensure a European presence worldwide […]".[4]

2.2.2 Cultural rationale for intervention

Increased globalisation, facilitated by the rapid development of information and communication technologies, affords unprecedented conditions for enhanced interaction between cultures. Indeed, according to UNESCO, globalisation is "giving rise to new forms of cultural diversity and linguistic practices particularly due to advances in digital technology". But UNESCO goes on to note the threats to cultural diversity that result from such globalisation. These relate to various vectors of human activity including:

[4] Green paper "Unlocking the potential of cultural and creative industries", COM(2010) 183

- **Creativity and the marketplace –** UNESCO highlights the importance of artistic creation and innovation as primary imaginative sources of cultural diversity; it notes that whilst globalisation has contributed to cross-fertilisation in all forms of artistic creation, the borrowings or hybrid forms to which globalization gives rise can turn out to be "little more than stereotypes, just as international markets for indigenous 'exotic' art can function as venues rewarding artistic conformism"; such a process risks creating a "global culture" at the expense of cultural diversity.

- **Communication and cultural contents on cultural diversity –** whilst modern communication can facilitate access to cultural diversity and create opportunities for intercultural dialogue and diversification of voices, UNESCO notes the potential for asymmetries implicit in the digital divide to restrict possibilities for genuine cultural exchange.[5]

In light of these threats, the EU has made a commitment to cultural diversity enshrined in Article 167 of the Treaty on the Functioning of the European Union which states that the EU "shall contribute to the flowering of the cultures of the Member States, while respecting their national and regional diversity and at the same time bringing the common cultural heritage to the fore." The Treaty gives the Union the mandate to "encourage cooperation between Member States and, if necessary, to support and supplement their action" in the field of culture (including the audiovisual sector). It also encourages the Union to "foster cooperation with third countries and the competent international organisations in the sphere of culture".

At the same time, the European Community and most of its Member States were also Parties to the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions, which the Community ratified on 18 December 2006 and which entered into force on 18 March 2007. The Convention enshrines cultural diversity as a "defining characteristic of humanity" and posits the "distinctive nature of cultural activities", beyond their economic value. It also recalls the crucial role of linguistic diversity in preserving cultural diversity, notes the challenges posed by globalisation processes, in particular for developing countries, and recognises the need to take measures to protect cultural diversity – including international co-operation. According to the Operational Guidelines of the Convention, States Parties should promote the emergence of a dynamic cultural sector, for example, through support for the promotion of cultural expressions along the value chain, i.e. creation, production, distribution/dissemination and access.[6]

2.3   Previous EU support for the audiovisual sector

Given the economic and cultural rationale for intervention – and its commitments under the Treaty and the UNESCO Convention – the EU has introduced various policy initiatives and funding programmes in support of the audiovisual sector. Since at least 1991, these have included efforts to build capacity and activities with a third country dimension.

The rationale for the **MEDIA I** programme (1991-95) included an explicit aim "to increase European production and distribution companies' share of world markets", which was to be pursued in part through cooperation with professionals in Central and

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[5] UNESCO World Report Investing in Cultural Diversity and Intercultural Dialogue; 2009

[6] Outline of Operational Guidelines Measures to Promote and Protect Cultural Expressions; Approved by the Conference of Parties at its second session (June 2009); UNESCO

Eastern European countries (which were at that time third countries).[7] One of the successors to MEDIA I maintained this focus: **MEDIA II** (Development and distribution) aimed to promote the circulation, in the European Union and outside it, of European television programmes capable of appealing to a European and world audience.[8]

The international dimension was strengthened further by the introduction of the **MEDIA-Plus** programme (Development, distribution and promotion) which operated from 2000 to 2006; the rationale for that programme set a general objective that referred explicitly to improving the competitiveness of the European audiovisual sector on international markets; it also included specific objectives of fostering the transnational dissemination of European films on the (European and) international market, facilitating and encouraging the promotion and movement of European audiovisual and cinematographic works at trade shows, fairs and audiovisual festivals (in Europe and) around the globe, and encouraging the networking of European operators by supporting joint activities on (European and) international markets.[9] European third countries were allowed to participate subject to the compatibility of their national legislation with the Community acquis. Non-European third countries were allowed to participate on the basis of supplementary appropriations and specific arrangements, including cost-sharing.

At the same time, the **MEDIA-Training** programme also aimed to give European audiovisual professionals the necessary skills to allow them to take full advantage of the European and international dimension of the market.[10]

Within the 2007-13 programming period, the **MEDIA 2007** programme maintained the international focus in terms of objectives and activities – reflecting in part the findings of the evaluation of MEDIA-Plus which highlighted the importance of international markets to the European audiovisual sector. One of the global objectives of MEDIA 2007 was thus to increase the circulation and viewership of European audiovisual works inside and outside the European Union including through greater cooperation between players. More specifically, the recital to the legal basis highlights the fact that "Co-operation with non-European third countries developed on the basis of mutual and balanced interests may create added value for the European audiovisual industry in terms of promotion, market access, distribution, dissemination and exhibition of European works in those countries".[11]

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[7] 90/685/EEC: Council Decision of 21 December 1990 concerning the implementation of an action programme to promote the development of the European audiovisual industry (Media) (1991-95)

[8] 95/563/EC: Council Decision of 10 July 1995 on the implementation of a programme encouraging the development and distribution of European audiovisual works (Media II - Development and distribution) (1996- 2000).

[9] Council Decision of 20 December 2000 on the implementation of a programme to encourage the development, distribution and promotion of European audiovisual works (MEDIA Plus — Development, Distribution and Promotion) (2001-2005) (2000/821/EC)

[10] Decision No 163/2001/EC of the European Parliament and of the Council of 19 January 2001 on the implementation of a training programme for professionals in the European audiovisual programme industry (MEDIA- Training) (2001-2005)

[11] Decision No 1718/2006/EC of the European Parliament and of the Council of 15 November 2006 concerning the implementation of a programme of support for the European audiovisual sector (MEDIA 2007)

Whilst the possibility of third country participation had been a feature of EU support for the audiovisual sector for many years, no non-European third country had applied to be covered by the MEDIA 2007 programme. For that reason, the **MEDIA International** Preparatory Action was introduced in 2008 to expand the two-way flow of cinematic works and strengthen co-operation between the audiovisual industries of EU Member States and third countries. Uniquely, MEDIA International was centred on the principle of mutual benefit for audiovisual professionals from EU Member States and from the third countries involved. As a Preparatory Action, it also paved the way for a full programme – **MEDIA Mundus** – which was duly introduced by a 2009 Decision.[12]

Described as a "broad international cooperation programme for the audiovisual industry to strengthen cultural and commercial relations between Europe's film industry and film-makers of third countries",[13] MEDIA Mundus had the following general objectives:

- increase the competitiveness of the European audiovisual industry;
- enable Europe to play its cultural and political role in the world more effectively; and
- increase consumer choice and cultural diversity.

MEDIA Mundus was also intended to "improve access to third-country markets and to build trust and long-term working relationships". Some €15m was available over the years 2011-13.

The specific objectives of MEDIA Mundus were as follows:

- Information exchange, training and market intelligence;
- Competitiveness and Distribution; and
- Circulation.

2.4   Overview of previous evaluations

Previous evaluations of the MEDIA Training Actions help assess the long-term progress of audiovisual training supported by EU funding to date. Key evaluations include:

- **Mid-term evaluation of the MEDIA Plus and MEDIA Training programmes (2004)**. This report focused on the short-term impact of MEDIA Plus and MEDIA Training on the basis of the results obtained after two years of implementation. The evaluator gave priority to the assessment of the implementation (input), the achievements (output) and the first results (quantitative and qualitative). The study also provided an analysis of the audiovisual market in Europe.

- **Final evaluation report on the implementation and the results of the MEDIA Plus and MEDIA Training (2001-2006) programmes (2008)**. It

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[12] Decision No 1041/2009/EC of the European Parliament and of the Council of 21 October 2009 establishing an audiovisual cooperation programme with professionals from third countries (MEDIA Mundus).

[13] http://ec.europa.eu/culture/media/mundus/index_en.htm

covered the period 2001 to 2006 and was based on the findings of the interim and final evaluations of the MEDIA Plus and MEDIA Training programmes.

- **Interim Evaluation of MEDIA 2007** (2010) including but not limited to training activities.

An assessment of the MEDIA Training Actions was undertaken as part of the **impact assessment**, which preceded the establishment of the **Creative Europe Programme**. Through the use of stakeholder consultations, this report provided evidence of the needs for the European Union to support training in the audiovisual sector and to fill gaps at national and sectoral levels. The impact assessment also provided evidence of impact, stating that "*networking activities such as co-production forums, international market and training initiatives result in a significant increase of transnational co-productions (from 26% of European films in 1989 to 34% in 2009). These films have a 2.3 times higher circulation potential than national films. Networks such as EAVE, ACE, Cartoon, created under the impulsion of MEDIA support, constitute the backbone of the European cinema industry*".

In terms of programme performance, the most recent overview of the MEDIA training achievements is the 2008 final evaluation of MEDIA Plus and MEDIA Training. This delivered overall positive conclusions, arguing that the programme – in relation to its objectives – was "well-suited to the needs of professionals in the sector". MEDIA Training projects were said to contribute significantly towards strengthening competencies in the European audiovisual sector, although it was deemed weaker in creating viable businesses. The programme design worked well in responding to the needs of the audiovisual sector, primarily through complementing areas where national interventions were not focused. European Added Value was seen to be two-fold:

- The value added was particularly strong in cases of an absence of a national support system, especially in the field of on-going education, where serious shortcomings had been observed; and

- The introduction of the European dimension into all actions helped to ensure a real added value to the actions undertaken, irrespective of their specific objectives.

2.5   Other training available

One question asked as part of this study is what training activities are developed with a non-EU international dimension. According to our wider stakeholder interviews, the most advanced/competitive training can be found in the US, Australia, New Zealand, Canada. For example, in Australia, the government has created Skills Service Organisations (SSOs) to support national Industry Reference Committees in developing and reviewing training packages available to a range of professions. There is an SSO whose remit covers both culture and ICT, and which is run by PwC's Skills for Australia.[14] However, at this stage, there appears little information in what the SSO is planning for audiovisual professional training in particular. Stakeholders report that alumni networking is much more developed and structured in the USA, sometimes part of a 'lifelong learning' policy and that North American institutions are often much better equipped with the newest audiovisual technologies. There are also important emerging industries in Asia, including South Korea and Indonesia. However,

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[14] https://www.skillsforaustralia.com/

the stakeholders and training providers consulted report that there is less exchange between Asia and Europe and could not therefore provide further information on training in those countries.

One stakeholder suggested that the interdisciplinary approach to audiovisual training is widely deployed and is "almost commonplace" in countries outside the EU, e.g. USA, Australia and Canada. We provide a brief case study example which illustrates some of the available Canadian training in the box below.

Case example: Professional training in Canada

Canada has a dedicated institute for film, television and digital media. The **National Screen Institute** (NSI) is a non-profit organisation and a national film, television and digital media training school for writers, directors and producers. NSI describes its training programme, which has been running for 30 years, as being "market-driven" and driven by the "learning by doing" principle. The NSI offers 11 different training courses covering skills for writers, directors and producers, including:

- NSI Aboriginal Documentary
- TELUS STORYHIVE Digital Shorts
- Corus Diverse TV Director
- NSI New Voices
- Movie Central Script to Screen
- TELUS STORYHIVE Web Series
- NSI Lifestyle & Reality Series Producer
- NSI Drama Prize
- NSI Totally Television
- NSI Business for Producers
- NSI Features First

There are several parallels between the training provided by NSI with that offered by the MEDIA Training Actions. According to NSI data, 87% of training participants who responded to survey in 2013 are working in the film and TV industry, hence there is a focus of training and improving the existing workforce. As in the MEDIA sub-Programme, courses are led by experts in film, television and digital media, who deliver workshops and seminars and mentor participants.

NSI states that the training content should i) appeal to Canadians, ii) have commercial appeal, and iii) help advance careers that will grow the Canadian industry and contribute to regional and national economies, stimulating employment for the long-term. The industry and market element of NSI's training is manifested through events such as the NSI Online Short Film Festival that showcases training results. In addition to these broader aims to support the audiovisual sector, the NSI also designs and delivers programmes that provide training to Canada's visible minority and Aboriginal screen professionals.

Another practical element that is shared by the EU and Canada alike is the considerable geographical distances that participants need to cover if they are to partake in face-to-face training. In this regard, NSI provides only intensive courses

Case example: Professional training in Canada

(along with online resources), which often seem to use the 'bring your own project' approach also used by the MEDIA Training Actions.

NSI derives 65% of its total revenues from corporate sponsorship, while 6% is earned through revenues from their training programmes and the remaining 29% come from various government and agency sources and foundations.

In addition to the NSI, there are also regional and sector-specific organisations. For example, Film Training Manitoba (FTM) aims to "develop a highly skilled and adaptable workforce to support the activities of Manitoba production companies". FTM collaborates with members of the film and television industry to identify training needs. It then designs and offers practical, skill-based training that is targeted where skills gaps occur (online and face-to-face).

Based on this initial review, there is no evidence that the non-European international training initiatives are of higher quality or more innovative compared to the MEDIA Training Actions. There is, however, evidence of the substantial focus on (and increased) internationalisation of MEDIA Training Actions which manifests itself through:

- Training providers in Europe actively inviting tutors with international experience/from outside of Europe to teach specific elements of Training Actions;

- Collaboration between MEDIA training providers and institutions in Asia (e.g. Crossing Borders), Latin America (e.g. PUENTES) and elsewhere; and

- Invitation to directly and systematically encourage trainees from the US and elsewhere to participate in between MEDIA training (e.g. Screen Leaders).

Our study suggests that although European training providers are keen to collaborate internationally however rather than emulating non-European/international training in Europe, media professionals are looking to invite international participants into existing initiatives. There is no evidence that training provided by the MEDIA Training Actions is particularly distinctive compared to training in the US, Australia, New Zealand and Canada. Instead, it is the overall "package" of support which makes the Training Actions distinctive, such as the opportunity for participants to network internationally.

Within Europe, the European Broadcasting Union (EBU) also offers training for audiovisual professionals through its in-house Academy. However, the EBU also caters for journalists and news professionals, thereby covering a different remit to the Creative Europe Programme. In terms of the course type, the design/pedagogies used are similar. However, EBU's overall approach to training is very different to that of the MEDIA Training Actions. Although the EBU operates according to the principles of subsidiarity and added value (i.e. it does not offer training which could be undertaken at national level), the Academy only organises training where there is clear demand from their national member organisations that there is a specific need. Once this need is expressed, the EBU designs the training content based on the requests.

According to the EBU, its training courses are often fully subscribed despite the fee payable, as the training is based on expressed demand (and a fast turnaround in terms of the organisation of the training).[15] Our analysis has not found evidence of any overlap in participation between EBU and MEDIA Training Actions.

[15] Interview of EBU 1 May 2016.

3.0 ANALYSIS OF SECTOR SKILLS NEEDS

The first priority of the MEDIA Sub-programme is to reinforce the capacity of the European audiovisual sector to operate transnationally. This includes facilitating the acquisition and improvement of skills and competences of audiovisual professionals and the development of networks. Clearly, for the MEDIA Training Actions to be effective, they must be relevant to current needs of professionals in the sector (and which cannot be met by national level or sectoral interventions).

This chapter therefore focuses on the skills needed for a successful European audiovisual sector in view of current and future challenges. It starts with an overview of the main trends that influence the European audiovisual sector. We discuss the impact of these trends and the challenges that they involve for future skills demand. In doing so, a typology of skills requirements is presented for the audiovisual sector. Based on this information, this chapter concludes with a discussion of identified skills gaps and the expected future evolution in skills needs.

Data for this analysis of skill needs in the audiovisual sector was collected in two ways. First, a literature review (listed in Annex Three) provided initial information on the trends, challenges, current skill sets and evolutions in skills needed within the European audiovisual sector. The findings of the desk research were then validated and complemented through interviews of stakeholders (listed in Annex Two).

A key source has been the report of the European Skills Council for employment and training in the Audiovisual and Live Performance sectors on 'Trends and skills in the European audiovisual and live performance sectors'. The objectives of the Creative Skills Europe's report were to collect existing data and qualitative analyses on trends in the European audiovisual and live performance sectors, analyse their impact on sector skills needs, put them in a European perspective, identify gaps in information, initiate discussions on key trends, and identify priorities for action.[16]

3.1 Trends and emerging challenges facing the European audiovisual sector

Over the last decade, the context in which professionals in the audiovisual sector in Europe operate has changed considerably. Three trends in particular have had a profound impact on the audiovisual sector and are expected to continue challenging businesses in the future: globalisation, the digital revolution and the economic and financial crisis. While these trends have been discussed in previous research, they were also identified during the interviews.[17]

3.1.1 Globalisation

Over a decade ago, when discussing the anticipated trends in the audiovisual sector, globalisation was already at the centre of attention. Nowadays, globalisation affects (and will continue to affect) the European audiovisual sector in different ways:

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[16] European Skills Council for employment and training in the Audiovisual and Live Performance sectors (2016), Trends and skills in the European audiovisual and live performance sectors.

[17] The results from the literature review were validated by all interviewees. Wherever relevant, additional input from the interviews has been added to the discussion of the trends, thereby referring to the interviews as the source of information.

- global competition increases with further trade liberalisation; and

- high migration has greatly expanded the cultural diversity of Europe's population.[18]

New international audiovisual operators enter the European market and take competition in the sector to another level as they do not necessarily face the same regulation as their established competitors. Hence, they may distort the competitiveness of the European players if the rules they have to abide by are less strict regarding issues such as privacy, funding or fiscal policy.[19] While such impediments may pull content creation activities away from the European audiovisual sector and promote outsourcing activities, at the same time, globalisation opens new markets for European audiovisual operators and productions. As a result, export trade is expected to increase, especially to emerging markets with large audiences, where more and more people acquire the means to consume audiovisual content.[20] These dynamics imply that international distribution and promotion of audiovisual productions require increased attention. This highlights the need for the European industry to participate in international networks to ensure playing an active role in the global economy.[21] In doing so, it can facilitate co-productions between players from different regions, countries and continents.

Increased cultural diversity and influences from other cultures bring new perspectives and new narratives into the audiovisual sector. Dealing with a diverse, international workforce is key in the global market, not only from a creative point of view, but also from a management perspective.[22] Moreover, migration also provides opportunities for more international exchange and cooperation, thereby stressing the need for strategic human resource management. At the same time, globalisation poses challenges to reach an increasingly diverse audience. In this respect, digital and technological evolutions (have) develop(ed) the tools to do so. This trend raises the need for cross-cultural competences.

3.1.2   Digital Revolution

By far the largest impact on the audiovisual business comes from the digital revolution, which fundamentally affects the entire audiovisual value chain as well as its interaction with the audience. The introduction of new technologies is requiring the sector to reinvent itself in certain ways to exploit new opportunities and anticipate risks that come with the on-going digitisation of the industry. Given the rapid pace and broad scope of the technological evolution, it urges audiovisual companies to keep abreast of developments in all parts of the value chain and adapt their activities wherever necessary.

First of all, new 'tools' such as 3D images and animation or immersive technology applications provide new audiovisual production opportunities. Examples are interactive non-linear documentaries or immersive gaming experiences. New technologies also improve the quality of sound and image recordings, as well as screen projections and sound reproduction. Moreover, it increases flexibility and cost

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[18] See e.g. EC SEC (2007) 570; Mercer (2011).
[19] EU Media Futures Forum, 2012.
[20] Murtagh, Murphy & Nanka-Bruce, 2015; UKCES, 2015.
[21] Source: interviews.
[22] Source: interviews.

efficiency during the creative production process.[23] For one, digital technologies simplify editing content and ensure an optimal use of audiovisual recordings. They also lower the barrier to creating content and, as a result, boost entrepreneurship as could be observed in the gaming industry since the mid-2000s.[24]

The possibilities and flexibility have also substantially increased for distribution, amongst others, since digitisation of content substantially reduces costs of duplication, customisation and transportation. Furthermore, content can be created for many platforms.[25] However, the complexity of distribution channels has also increased. Analogue broadcasting has gradually been replaced by digital transmission through a cable line, a satellite dish, online platforms or an over-the-air transmission television set.[26] This evolution promoted HD transmissions and multichannel television in the market. It also facilitated the introduction of digital recording, thereby offering an alternative to linear viewing, which gives people the opportunity to watch the recorded content whenever they want.[27] Furthermore, due to convergence, people can display audiovisual content on diverse screens, anywhere they want, since more and more devices are connected to the Internet or 3G/4G networks. This contributes to a blurring of boundaries between different creative industry sub-sectors as they face similar opportunities and challenges.[28]

The opportunities provided by the digital revolution convinced new players to enter the audiovisual sector (e.g. video-on-demand (VoD) platforms, streaming services, telecommunication operators, Pay TV companies) and the interviews showed that it is expected that this trend has only started to materialise. Moreover, digitisation has led to changing roles in the audiovisual production chain, with large corporations no longer having full control of the production chain. Digital technology allows small and micro-enterprises to take up other tasks/different roles in the audiovisual production chain.[29] For instance, they can skip some links in the value chain by offering content directly to customers and tailor it to their needs, thereby reducing the role of intermediaries. Alternatively, distributors and technological companies are more and more likely to invest in content creation. In general, the industry is moving away from linear value chains towards centralised platforms, stimulating interaction between different players.

As new technologies facilitate audiovisual translation services like subtitling and dubbing, digitisation makes it possible to reach a wider audience.[30] Since audiovisual content can be viewed in diverse places, these services are not only valuable for the deaf and hearing impaired, but also for audiences in public places where only images are broadcasted. Additionally, it gives hearing viewers the opportunity to improve their language skills or keep up with dialogue when it is difficult for them to hear the audio.

For other categories of 'creators' (cinematographers, cinema and live performance

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[23] European Commission, 2012.
[24] NESTA, 2014.
[25] Source: interviews.
[26] European Commission, 2012.
[27] Bain and Company, 2014.
[28] Source: interviews.
[29] Source: interviews.
[30] Georgakopulou, 2012.

technicians, etc.), the digital shift has also deeply transformed their operating environments and also the way their works are distributed (live streaming, high-definition, Internet channels, etc.). Although many people are convinced that the creation process remains unchanged, creators still need to understand and adjust to the new environment and adapt their skills sets to new technologies, in order to take full advantage of the new opportunities.[31]

Digitisation has a major impact on audience behaviour. Not only can people 'watch content anytime, anywhere and on every device', there is also increased co-creation with the public on content as well as programming. The increased participation is largely promoted by the Internet and the affordability of hardware and software. For instance, numerous websites are devoted to series and television programmes, and digital communities have arisen to discuss audiovisual content in detail on online platforms.

The report published by the European Skills Council for employment and training in the Audiovisual and Live Performance sectors also make this point, stating that the "key evolution for the audiovisual sector stakeholders has been the transition to a 'multi- platform environment' combining a presence on the web and on new multimedia applications with their traditional distribution channels. This multiplatform environment requires not only new maintenance skills but also new competences in the fields of creation and production".[32]

Furthermore, through interviews undertaken by this study we have learned that, given changing audience behaviour, the rise of big data related to consumption will be extremely valuable to gain insight into market demand. Rather than thinking being supply-oriented, operators throughout the value chain should understand new distribution channels and export opportunities by analysing consumer behaviour as a way to understand consumer preferences.[33] This evolution will be crucial for the marketing of programmes on the Internet. Nowadays, while audiovisual enterprises end up selling content to different platforms (broadcasters, VoD), it remains difficult for them to see how many consumers use their content and in what ways, as they do not have access to data gathered by intermediary organisations.[34]

3.1.3   Economic and financial crisis

The economic and financial crisis has been an important driver of change for the European audiovisual sector. This is apparent on three levels: funding opportunities, business concentration and the increased importance of self-employment and entrepreneurship.

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[31] European Skills Council for employment and training in the Audiovisual and Live Performance sectors (2016), Trends and skills in the European audiovisual and live performance sectors.
[32] Ibid.
[33] Source: interviews.
[34] Source: interviews.

Funding opportunities

Across Europe, the crisis has put pressure on budgets for advertising and public funding of culture, including audiovisual production.[35] Banks have become (even) more risk-averse, increasing the barriers to finance for many audiovisual organisations.[36] At the same time, the crisis (in combination with technological evolutions) has led to an increased diversity of financial players and alternative financial instruments, such as micro-finance, crowd-funding or venture philanthropy. Emerging business models tend to rely on direct pay revenue models like subscription-based viewing.[37]

The economic and financial crisis has also intensified the debate about fair pay for all partners in the value chain. In that respect, intellectual property rights are important for companies to create value.[38] Hence, fighting piracy - which has become easier due to digitisation – and establishing clear licensing regimes are as vital as securing access to finance.[39] This has increased the need for more advanced financial and legal intellectual property knowledge with many operators in the sector.

Business concentration and structural collaborations

In order to remain competitive and operate in an efficient way, the audiovisual sector will need to pursue synergies with distribution platforms, technological organisations and partners in the global market.[40] Yet structural collaborations between diverse audiovisual operators are also more widespread. Given the economic climate, the audiovisual sector is becoming increasingly concentrated due to consolidations that are intended to exploit scale.[41] Marinelli (2015) distinguishes three trends:

- 'Vertical integration' to raise content ownership, e.g. by consolidating production and distribution companies;

- 'Digital diversification', e.g. by buying multi-channel networks and exceed the activities that are possible within the context of traditional distribution channels; and

- 'In-market transitions', referring to a consolidation of different sectors of activity.

These actions to develop scale do not imply that all activities are centralised. There is also a trend towards decentralisation that can be operationalised in multiple ways. Divisions may be defined according to the regions in which the corporate group is active, according to diverse organisational activities and according to creative activities.[42] Such diversification gives large organisations the flexibility to respond to diverse needs within the company and/or in the market.

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[35] Source: interviews.

[36] IDEA Consult, 2013.

[37] See e.g. EC, 2012.

[38] Bain and Company, 2014; Forum d'Avignon, 2015.

[39] Source: interviews.

[40] Audiovisual Strategic Review Steering Group, 2011.

[41] EC, 2012.

[42] EC, 2012.

Entrepreneurship

The economic and financial crisis has also increased pressure on audiovisual operators to further professionalise their businesses and raise the multiplier effect of grants received through increased entrepreneurship. Beyond creative capabilities, audiovisual operators are increasingly expected to also master entrepreneurial and managerial capabilities, especially in SMEs where, for instance, a freelance producer is responsible for all aspects related to entrepreneurship.[43] This requires profound knowledge of the sector, as well as related fields, in order to identify business opportunities and assess the accompanied risks.[44]

The interviews confirmed that the audiovisual sector is growing in terms of number of companies, while there is no similar evolution in terms of employment. This indicates a duality in the sector with a limited number of major companies at one end of the spectrum and lots of freelancers and micro-organisations at the other. Creative Skills Europe concludes, among other things, that the number of self-employed professionals continues to increase rapidly. Diverse economic factors support this trend, like a reduction in the stability of contracts due to the economic crisis, fewer resources to employ staff as a results of budget cuts and the automation of certain tasks due to digitisation. Hence, while some audiovisual workers are freelancers on a voluntary basis, others become self-employed due to external circumstances beyond their control. In either case, this implies that audiovisual staff are often in charge of their own career; they need to construct it by combining different projects and diversify their activities to remain employable in different, yet related, fields.

3.2   Impact of those trends on future skills demand

The above-mentioned trends and challenges that will continue to influence the European audiovisual sector in the next years also have a direct impact on the skills required by audiovisual professionals.[45]

Globalisation increases the need for cross-cultural competences in order to be able to operate in an international context, within teams and across borders. It becomes increasingly important to know how to interact with people with diverse cultural backgrounds as team members in the production process, partners in the audiovisual value chain and as audiences. Besides people and language skills, this also requires in-depth legal and regulatory knowledge and skills.[46]

The digital revolution increases the need for multiple, up-to-date digital skills. This requires audiovisual workers to be technology-capable business professionals, who understand the strategic implications of technology and have the ability to understand and exploit technological advances. They should be experts in using new technological tools as a way to improve the creation, production, distribution and exhibition of audiovisual content, but also as a way to combine multiple roles in the audiovisual value chain.[47] Additionally, they also need the skills to cope with user-generated content and social media as well as multi-platform skills, i.e.

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[43] Source: interviews.
[44] HBU, 2010, IDEA Consult, 2013.
[45] See e.g. EC (2011), Which Skills for Culture in Globalised and Digitalised World? European Culture Forum 2011.
[46] Source: interviews.
[47] Source: interviews.

the creative, legal and technical skills to produce content for distribution across all potential platforms. It is necessary for them to understand the impact of the online market and gain insight into issues such as copyright legislation.[48]

In the current economic climate, **it is vital for companies to ensure access to finance and do business in a way that is financially healthy**. This can be arranged by developing (business) innovation skills, i.e. skills to develop new ways of doing business and testing new business models. This goes beyond financing and includes strategic choices like audience development strategies that impact the entire value chain. When it comes to the skills necessary to maximise returns on investment, skills related to the understanding of intellectual property legislation to provide protection from piracy, and exploiting intellectual property internationally to take full advantage of emerging markets are also vital.[49] In times of globalisation and budgetary constraints, this asks for proactive behaviour in the industry. Audiovisual professionals in each part of the value chain have to show stronger entrepreneurship and business skills to keep innovating and stay ahead of competitors. In order to maximize revenues, sales and marketing skills are needed as a way to get the most out of created content and anticipate the audience's needs and expectations. Given all these required skills and the tendency to work with smaller teams due to limited financing, audiovisual staff needs skills to be versatile and employable in diverse settings. Accordingly, they will need the skills to work in cross-functional creative / technical teams within and across companies (in an international context). This calls for well-developed project management and coordination skills.

Other, related implications of the identified trends for skills demand became more apparent during the interviews. They relate to the increased need for multi-skilling and the capacity to adapt to a changing environment among the audiovisual workforce.

In general, **workers' skills profiles are T-shaped**: they are usually specialised in one thing (the vertical dimension of their skills set), but they should also be acquainted (to a certain extent) with other tasks/roles related to their core specialty (the horizontal dimension). Journalists, for instance, are not only responsible for doing research and interviews, they also have to be able to edit their content, publish an article on the website, hold their microphone etc. Although journalism is not within the remit of the MEDIA programme, this aspect certainly also applies to documentary film-making. This increased multi-skilling is very important in the sector as occupations evolve due to economic and technological evolutions. Still, by combining multiple skills, people tend to be afraid of losing their core skills and deliver inferior quality.

Learning to adapt to complexity is one of the key skills of the future. People need the capacity to adjust to change throughout their career. Right from the start, they have to realise how important it is that they 'learn to learn'. Graduates should already realise what they can and cannot do, yet should also be able and willing to learn new things as the audiovisual context is very complex and that complexity will only increase, not only job-wise but also career-wise. As audiovisual workers get more and more short-term contracts and usually work on a project basis, careers in the sector become less and less linear. This requires substantial people skills since each project has its own team of professionals working on it, but also well-developed entrepreneurial skills, especially among freelancers as they need to acquire funding and develop and implement long-term strategies in a multiple media platform context.

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[48] Source: interviews
[49] Source: interviews

They need to think and act in a more entrepreneurial way and be familiar with the legal and fiscal framework as well. Furthermore, every worker needs the capacity to manage his or her career and have attention for job crafting (e.g. cameramen/women should also be able to take up other roles like editing content).

This evolution comes with an important challenge, i.e. how to fund training for the self-employed who generally lack both the time and resources to participate in training. Even so, it is vital that they know how to manage and market themselves as a freelancer. Moreover, self-employed professionals setting up their own business are generally experts in their craft. Once their businesses start growing and hiring people, they suddenly also become employers and managers. Then, it is important for them to know how they can use everyone's talent as much as possible.

The extent to which diverse trends will impact skills in the audiovisual sector is hard to assess. The World Economic Forum has estimated the expected degree of skills stability at industry level by means of its Future of Jobs Survey. Table 3.1 shows that by 2020, across a diverse range of industries, 35% of the essential skills of most jobs will be skills that are not yet critical to the jobs in 2015. In the media, entertainment and information industry, it concerns one out of four skills (27%) that is expected to change over time due to diverse trends that disrupt the environment within which audiovisual companies function. Given the rapid pace of change, skills will have to be updated on a regular basis in order to respond to employers' needs and at the same time, training providers need to engage in upskilling as well. As the industry is changing so fast, they need to keep their knowledge and skills up to date to meet the training needs of employers and the workforce.

Table 3.1 Skills Stability, 2015–2020, industries overall

Industry group	Unstable	Stable
Industries Overall	35%	65%
Media, Entertainment and Information	27%	73%
Consumer	30%	71%
Healthcare	29%	71%
Energy	30%	70%
Professional Services	33%	67%
Information and Communication Technology	35%	65%
Mobility	39%	61%
Basic and Infrastructure	42%	58%
Financial Services & Investors	43%	57%

Source: Future of Jobs Survey, World Economic Forum.

As can be seen from Table 3.2, the report on Trends and skills in the European audiovisual and live performance sectors produced very similar conclusions to those presented in this section.

Table 3.2 Trends and skills in the European audiovisual and live performance sectors

Trends and skills in the European audiovisual and live performance sectors	
Developing labour market intelligence	The data collected on the audiovisual and live performance employment markets in the different EU countries is partial and cannot, at the moment, be compared at European level. In many countries, no statistics are available at all or are not accessible to sector professionals and/or the broader public. Efforts need to be made to collect relevant data, guided by Eurostat. It will be vital to mobilise national stakeholders to collect comparable statistics, from national statistical agencies to ministries of employment and industry, and authorities issuing qualifications.
Creating spaces for exchanges and cooperation	Opportunities for meeting, exchanging views, and designing joint initiatives are strongly recommended by stakeholders (social partners, educational bodies and professional associations), as essential tools for enhancing the quality of professional training in the audiovisual and live performance sectors. In many countries, it is all too rare to find any discussions on trends and their impact on professional training needs taking place at sectoral level, and almost never in formal settings that would open the way to structural changes. Opportunities for meeting, exchanging views, and designing joint initiatives are strongly recommended by those same stakeholders as essential tools for enhancing the quality of professional training in the sector.
Equipping sector professionals with relevant skills in the digital environment	The digital shift has transformed our day-to-day lives and also the operating environment of most operators in our economy. Certain skills for navigating this new reality have therefore become essential, and this is particularly true in the cultural and creative sectors, which have seen almost all their activities drastically changed as a result of the digital shift. In the audiovisual sector, the multiplatform environment demands new creation and production skills, new technical skills, and also the capability to invent new business models that will permit the sustainability of the activity in the long-term.
Acknowledging the transformation of the sector and the corresponding impact on careers	The changes now operating in the audiovisual and live performance sectors affect not only all their activities and prospects for development, but also modify the careers paths of professionals. Finding solutions to finance such schemes should become a priority for the sector, either through collective agreements, or via unions and employer-driven initiatives and/ or public funding. Support schemes should be accessible to all workers (employees and independent) and be flexible enough to enable rapid adjustment to the new realities faced by the sector. While elaborating these schemes, the sector should be thinking 'out of the box' to acknowledge and respond to the latest trends.
Promoting schemes for on-the-job learning adapted to the sector	The rapid and deep-seated developments that have transformed the audiovisual and live performance sectors require strong links to be forged between the world of work and the world of education. New models of skills acquisition must be developed to put learners into 'real life' situations, enabling them to understand the reality of the tasks that will be demanded of them and their future working

Trends and skills in the European audiovisual and live performance sectors	
	conditions. On-the-job learning schemes, still rare in the sector, have therefore to be trialled on a larger scale, with due regard for the specific features of the industry.

Source: European Skills Council for employment and training in the Audiovisual and Live Performance sectors (2016)

3.3   Typology of skills requirements in the audiovisual sector

The audiovisual sector demands hybrid expertise among the workforce, combining creative, technical, entrepreneurial and softer skills as the industry is characterized by a variety of functions and activities going from creation and production to distribution, etc.[50] The need for a combination of skills arises from the trends discussed above, such as more competitive markets and the need to adapt to a changing environment and combine different professional roles in order to remain competitive.

When summarising the current and expected skills requirements for audiovisual professionals to operate successfully in the audiovisual sector, we come to a typology including five different categories of skills required:

- Craft-specific skills;
- ICT/digital skills;
- Business management skills;
- Leadership, innovation and entrepreneurship; and
- Interpersonal, social and cross-cultural skills.[51]

These reflect previous research in this area, for example, undertaken in support of the impact assessment for the Creative Europe Programme and other studies for the European Commission. These areas are also highlighted in the Regulation establishing Creative Europe. For example, the recital to the Regulation highlights the importance of the entrepreneurial dimension of cultural and creative industries, as well as the need to adapt to the digital shift.

Whilst the first category of skills (craft-specific skills) contains the core competencies of professionals active in the audiovisual sector, the above discussion has made clear that current and future audiovisual professionals require skills beyond these core competencies. Training of audiovisual professionals should therefore also focus on the other four categories of skills (ICT/digital skills, entrepreneurship and business management skills, interpersonal/social/intercultural skills).

The first category of skills is very specific to each occupation and is less easily transferable to other jobs. This is not the case for the remaining four categories of skills. These can apply in a broad variety of work situations, and thus increase the diversity of career opportunities. The increasing recognition of the importance of (training in) transferable skills is not an audiovisual-specific trend but a general trend across sectors. However, there is no consensus in the literature on the best way to

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[50] Audiovisual Strategic Review Steering Group, 2011, Creative Skills Europe, 2016; UKCES, 2015.

[51] This typology has been developed by the research team and validated during the interviews.

organise transferable skills training (formal or informal learning? at what stage of education?).

The table below offers a typology of skills.

Table 3.3 A typology of skills requirements

1. Craft-specific skills	**Creation - Conception** • (script) writing skills • Narrative/storytelling skills • Composing skills **Creation - Execution** • Audio/sound engineering • Film/TV camera operation • Lighting skills • Animation development • Games design and development skills • Directing skills (animation, documentary, fiction) • Editing skills • Cinematography skills • Frame analysis • Set and costume design • Acting skills • Presentation skills • Translation skills (e.g. subtitling, dubbing) **Production** • Project development/planning • Organisation and coordination skills • Legal skills • Financial project management skills • Human management/people skills • Communication skills • Knowledge of health and safety on the job **Distribution and exploitation** • Broadcast engineering skills, e.g. transmission • Cinema projection • Cross-media management • Strategic planning skills • Market analysis skills
Skills that are relevant for each part of the value chain	
2. ICT/digital skills	• General computer skills, e.g. use of computer/software • Knowledge of new technologies and platforms • Use of new digital technologies (craft-specific use and in relation to business development) • Use of digital platforms • Web/internet design/development

	• Inter-operability of services and devices • Knowledge of regulatory issues related to digitisation, including data protection
3. Business management skills	• Access to finance / financial management • Accounting • Knowledge of the legislation, e.g. about intellectual property and copyright, contracting, social security and taxes, health and safety, funding opportunities • Sales and marketing, including understanding of international markets • Human resource management Administration
4. Leadership, innovation & entrepreneurship	• Business modelling / new business models • Strategic thinking / leadership / business development • New approaches to audience development • Commercial acumen • Pitching, presentation and proposal-writing • Willingness to take risks and to fail • The creative ability to think about the world from a clear, open perspective • Knowledge of the field as well as related disciplines The ability to work at the interfaces of disciplines
5. Interpersonal, social and cross-cultural skills	• (international) partnership management skills • Client management • Negotiation skills • Communication skills, including self-presentation • Networking skills • Skills for working in a cross-cultural and cross-functional setting • Foreign language skills

3.4 Identified skills gaps and expected evolutions

Despite the dynamic nature of the environment within which the audiovisual sector operates, the evolution of skills and – as a result – skills gaps, has hardly been studied at European level. However, this has changed with the introduction of Creative Skills Europe, the European Sector Skills Council for the Audiovisual and Live Performance Sectors, co-funded by the European Commission. This platform piloted by European social partners and national skills organisations examines, amongst others, trends and skills needs in the audiovisual sector.[52]

Detailed analyses of skills gaps in the audiovisual sector are scarce, yet, are available for the UK thanks to the employer and employee surveys that Creative Skillset has

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[52] http://www.creativeskillseurope.eu/about-us/.

been organising for years.[53] As the UK is the largest player in the European audiovisual market, the results from these studies are highly relevant for other countries. Moreover, they comply with the results of the skills analysis of the film and broadcast sector in the Honeycomb region (Northern Ireland, western Scotland and the six Republic of Ireland border counties) in 2015.[54] As their main research findings comply with the experience from the experts interviewed for this research project, this section summarises the conclusions.[55]

3.4.1 Indications about the extent of the skills gap

Although Creative Skillset's most recent employer study dates from 2010, it gives a clear view of the share of employers experiencing a skills gap in the UK's creative sector. The results show that 28% out of 2,490 respondents experienced a gap between the current skills of their staff and those required to reach all corporate goals. When analysing this proportion by sub-sector, the perceived skills gap is larger than average in all audiovisual sub-sectors, peaking at 42% in the film distribution and cinema exhibition sub-sectors.

From an employee perspective, the Creative Media Workforce Survey (Creative Skillset, 2015) demonstrates that approximately one out of two workers has a learning or skills need, with limited differences between sub-sectors. While the workforce in cinema exhibition (31%), the gaming industry (40%) and film (41%) reported the lowest level of skills need, the highest levels were reported by the workforce in facilities and film production (both 54%) and animation and independent TV production (both 51%). More apparent is the difference according to work status with freelancers having a higher skills need than permanent workers (i.e. 57% versus 45%).

This confirms the challenge identified during the interviews to find an effective way to promote training among freelancers.[56] Moreover, the interviewees agreed that graduates require additional on-the-job training in order to be ready for the job, thereby indicating that there is a gap between the skills provided by training and education, and the skills that are in demand in the labour market. Nevertheless, all interviewees stressed that it is very difficult, if not impossible, for education and training providers to keep up with rapidly changing technological evolutions. Close collaboration with audiovisual enterprises will be required to fill the skills gap.

3.4.2 Exploring the nature of the skills gap

The most recent and most detailed data on the nature of skills needs was collected by a survey on the skills and development needs of the film and broadcast sector in the context of the Honeycomb - Creative Works programme part-financed by the European Union's INTERREG IVA Cross Border Programme managed by the Special EU Programmes Body.[57]

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[53] See e.g. Creative Skillset 2010, 2011, 2015.

[54] Murtagh et al., 2015.

[55] As some aspects were highlighted during the interviews, we referred to the stakeholder consultation wherever relevant.

[56] Source: interviews.

[57] Murtagh et al., 2015.

The survey identifies three key areas of skills deficits, namely craft/technical skills, sales and marketing skills, and business skills, thereby confirming previous research findings.

- Craft/technical skills are at the centre of content creation and are very diverse, given the broad range of professions in diverse sub-sectors of the audiovisual sector. The Honeycomb survey showed a general concern about editing skills needs in the television and film industry. Furthermore, each branch is confronted with a particular skills gap, although there is a certain overlap between the television and film sectors.

  - In the television sector, camera skills and computer programming skills are in need of development. This is in line with a 2015 survey among 121 UK TV production companies experiencing skills gaps when it comes to writing, editing and understanding compliance. Moreover, it is apparent that they perceive two general challenges for UK production workers, namely knowing how to create content in a multi-platform environment and the increasing need for multi-skilling in the digitised work environment.[58] As teams have a tendency to become smaller, workers will need a broader skill set to function well in diverse contexts.

  - Craft/technical skills in need of development in the film sector are – besides editing – camera skills and skills related to computer/software usage and editing. Lighting skills and audio/sound/music skills need improvement to a lesser extent according to the Honeycomb survey.

- Sales and marketing skills are a second set of skills that employers lack in the workforce. The perceived gap first and foremost concerns pitching. Other marketing skills in need of improvement are skills with respect to social media, negotiation, internal markets and e-marketing.

- A third skills gap refers to business skills, including entrepreneurial skills and market knowledge. The workforce is insufficiently skilled for networking at national and international level, identifying opportunities and having commercial insight.

These findings confirm the conclusions of EC-film producers (2012), expressing the need for more business skills related to financing, distribution and marketing skills. They are also in line with the results from Creative Skillset most recent employer survey, which dates from 2010. The results indicated that – across audiovisual sub-sectors – most employers reported skills gaps in the field of sales and marketing. Related skills in need of development were leadership and management skills as well as other business skills. Secondly, most employers reported a need for technical skills, and accordingly, skills in using software packages, multi-skilling and skills to develop content for multiple platforms.

The interviews confirmed the need to keep technical skills up-to-date, yet, at the same time, underlined the importance of multi-skilling and developing the entrepreneurial skills of audiovisual professionals, especially given the high number of freelancers and very small organisations. They also need to be able to manage and market themselves as freelancers.[59] Furthermore, being familiar with the legal and fiscal framework is a basic requirement to be active in the sector as diverse types of workers cooperate on

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[58] Creative Skillset, 2015.
[59] Source: interviews.

a project basis, possibly across platforms and borders. Consequently, for instance, producers need to know the specifics about contracts, copyright, etc. to manage their production in an appropriate way.

The Creative Skillset's 2014 Workforce Survey shows the skills needs from the employees' perspective for different subsectors of the audiovisual sector. The most urgent training needs (i.e. the three most important areas according to the workforce) turn out to be very similar in the diverse fields:

- Most workers in the **animation industry** (55%) feel they need to improve their skills in using software packages, while 27% of the workforce perceives a need to develop their craft/technical skills. Similarly, 26% consider their creative talent in need of development.

- In the **games** and **television** industries one out of two professionals wants to develop their craft or technical skill, while one out of three want to develop their skills in using software packages. In the television sector, creative talent is the third area of skills need (according to 18% of professionals), whereas leadership and management skills rank third for professionals in the games industry (with respectively 19% and 23%).

- Almost one out of three professionals in the **film sector** (31%) identified craft or technical skills as areas of skills need. Skills in using software packages (28%) and leadership and management skills (26%) were the next most important areas of skills need.

An important difference identified related to the work status of audiovisual professionals. Freelancers in all creative media selected two major areas of skills need, i.e. craft or technical skills (selected by 55% of the workforce) and skills in using software packages (selected by 40% of all freelancers). To a lesser extent, they identified a need to develop their creative talent (17%), their business skills (14%) and their leadership and management skills (13%). These shares differ considerably from the skills needs among permanent workers in all creative media, which are generally lower. Most permanent workers (39%) perceive a need to improve their craft or technical skills, while one in four permanent workers perceive their skills in using software packages and their leadership and management skills in need of development. Only a small fraction of permanent workers considers their sales and marketing skills (15%), business skills (11%) and creative talent (9%) as areas of skills need.

Contrasting the EU level with a Member State level, the understanding of the skills gaps at national level is relatively low, with the exception of France and the UK, whose audiovisual sectors have established sophisticated skills organisations, which are steered by social partners and supported by national strategic policy that prioritise the development qualitative analyses of skills trends. As stated elsewhere in this report, the capacity of the audiovisual sectors varies across European countries, as does policy in support of developing national industries. While similar analyses are being developed in other national contexts (within the EU countries), they are not always formalised and/or published.[60]

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[60] European Skills Council for employment and training in the Audiovisual and Live Performance sectors (2016), Trends and skills in the European audiovisual and live performance sectors.

3.4.3 Training as a response to current skills needs

During the interviews, it became apparent that audiovisual organisations and professionals across the EU are dealing with broadly similar challenges. However, Member States appear to be at different stages in finding solutions to deal with the identified skills needs. Although there are a number of challenges to be dealt with, action is generally taken at three levels: the educational system, (continued) vocational education and training (VET) and national skills organisation:

- **Initial education** seeks to deliver school leavers whose skills are in demand on the labour market. Yet, some schools follow the ongoing evolution in the audiovisual sector more rapidly than others, although it is near impossible to synchronize curricula with the labour market as the trends continue to evolve at rapid pace. Hence, demand-oriented education is key, but additional initiatives are needed.[61] Furthermore, training providers need to keep their skills up-to-date as well.[62]

- **Vocational education and training** can play an important role in keeping the skills of the current workforce up-to-date. However, some countries provide more opportunities for ongoing education and training than others. Especially the self-employed and very small companies are facing substantial barriers to investing resources in training. Raising awareness of the importance of doing so, is a first step in getting things done.

- **National skills organisations** have been established in some Member States to monitor the audiovisual sector and develop instruments to respond to the needs of audiovisual professionals (including freelancers) and enterprises. Such organisations can play an important role if they have the means to collect information and develop solutions to do so.[63]

At all levels, there is a clear need for a structured dialogue between the sector and education and training providers. There should be the right balance between the artistic dimension and market demand when developing skills in the audiovisual sector. In general, employers and the workforce turn to training to close perceived skills gaps. However, at the same time, the potential of alternative instruments such as apprenticeships and traineeships is being explored.[64] Such systems are well-developed in the UK, where trainees in a particular programme not only have to master the necessary technical skills, but also have to pass a training module devoted to entrepreneurship. Yet the economic crisis tends to limit the resources that businesses are able or willing to invest in apprenticeships or traineeships.[65]

The European Skills Council for employment and training in the Audiovisual and Live Performance sectors also points to a need for data in order to recognise the specific features of the audiovisual sector and of its subsectors. The Council argues that more pan-European data should be collected (by Eurostat), including on employment mobility. However, the sector's characteristics are also affected by the economic downturn which has "dramatically reinforced some of the employment features of the audiovisual and live performance sectors, namely project-based work and self-

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[61] Source: interviews.
[62] Source: interviews.
[63] Source: interviews.
[64] Source: interviews.
[65] Source: interviews.

employment."[66]

During the interviews, national skills organisations expressed the need to raise awareness among employers about the importance of offering training to their employees and keep their own skills up-to-date, especially when being self-employed. The main problem is that most professionals work on short-term projects and therefore employers seldom feel the need to invest in skills. Additionally, the general response from companies is that they lack sufficient time for dedicated training initiatives and instead rely strongly on skills development on-the-job. Nonetheless, employers look for training opportunities and make use them if they really feel the need. In the UK, Creative Skillset's Workforce Survey monitors participation in training. In 2014, 51% of all permanent workers in creative media had undertaked training in the last 12 months versus 47% of all freelancers. However, among the workers that participated in training, the average number of training days is higher among freelancers (16 days) compared to permanent workers (11 workers).

The survey also mapped the subject of training undertaken by audiovisual workers in the previous year. The results show, among other things, that more freelancers engage in training to develop their craft or technical skills compared to permanent workers (51% versus 36%) and the same holds for training aimed at developing their creative talent (18% of all freelancers in creative media versus 7% of all permanent workers). Training subjects appear to differ among diverse subsectors:

- In creative media sectors like **television** and **gaming**, about 40% of professionals participates in training to improve their craft or technical skills. Leadership and management skills come in second as training subject; such courses are followed by 30% of professionals in the gaming sector and 21% of television professionals. Business skills were the subject of training undertaken in the last year for respectively 17% and 18% of professionals in the television and gaming sectors. In all three sub-sectors, approximately one in ten professionals follows training aimed at developing their creative talent.

Case example: Swedish games industry

The Swedish computer industry has increased eight-fold 2010-14 in terms of turnover (SEK 8.8bn) and three-fold in terms of staff. If there had been more training, then the increase in staff would have been bigger. Due to a lack of sufficiently trained staff, the Swedish Games industry recruit from other sectors and even 'borrow' staff (on short-term contracts) from other companies in the industry. Although this is an unusual arrangement, it appears to work reasonably well.[67]

- In the **film** sector, the share of professionals undertaking training to improve their craft or technical skills (27%) is as large as the share following training to improve their leadership and management skills (29%). This is twice the share of professionals following training to develop their business skills or creative talent.

- This is in sharp contrast with the workforce in the **animation** sector, where 29% of professionals participate in training to enhance their creative talent, while 19%

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[66] European Skills Council for employment and training in the Audiovisual and Live Performance sectors (2016), Trends and skills in the European audiovisual and live performance sectors.
[67] Stakeholder interview.

seek to improve their craft or technical skills through training. Less than 5% of professionals follows training devoted to leadership and management skills or business skills.

While these results show that audiovisual professionals mainly participate in training focusing on craft or technical skills, most European training programmes co-financed by the MEDIA programme in 2007-2013 focused on management and business skills. Figure 3.1 gives a visual overview of the main and secondary focus of all training courses in the 2007-2013 MEDIA training programme. When focusing on craft or technical skills, most courses seek to improve skills related to script development.

Figure 3.1 Number of MEDIA training courses in 2007-13 by primary and secondary focus
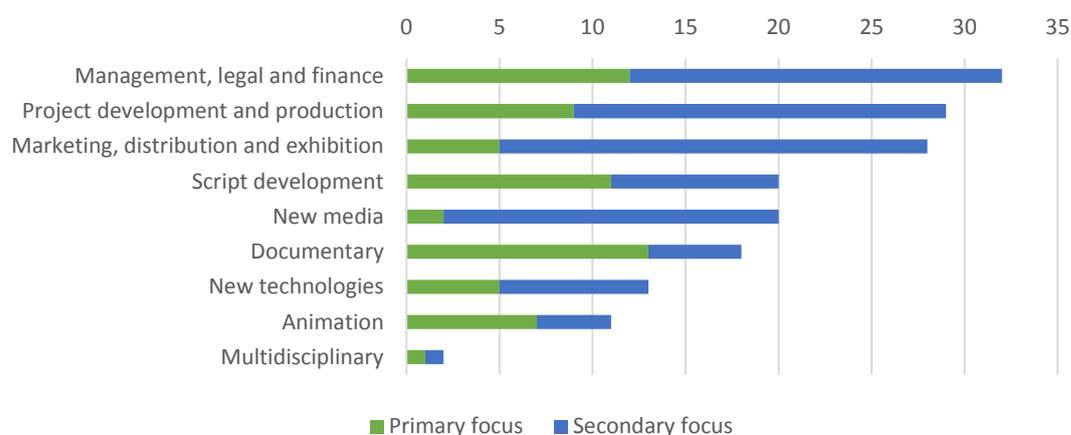
Source: IDEA Consult based on European Commission (2014), Training and Networks 2014, Creative Europe MEDIA

3.4.4   *Expected evolution in skills needs*

When combining the on-going trends with the current skills gap, certain evolutions can be expected to occur in the next few years. First of all, rapid digital and technological evolutions will continue to create a need to develop workers' craft and technical skills, thereby making it a stable skills need. What will be new is that the combination of technical skills, i.e. multi-skilling, will become increasingly important due to budget cuts and technological evolutions. Other skills clusters are expected to become more important, like entrepreneurial and business skills. As the audiovisual sector is already characterised by the high share of micro-organisations and freelancers and their presence is expected to increase, more and more audiovisual professionals will have to be able to manage their own businesses. Additionally, as audiovisual work is generally organised around projects and job security is decreasing, professionals will also increasingly need to develop career skills in order to be able to use their skills and combine jobs in order to remain employable.

From an organisational point of view, raising awareness about the importance of training will remain high on the political agenda since many professionals and their employers do not (sufficiently) invest in training. They explain this as being due to a lack of time and/or financial resources.

There is a clear need for high-quality on-the-job training since this may help to reduce barriers to investing in more formal forms of training, yet, this cannot be used as a stand-alone practice; interaction with other training providers will remain necessary. This is especially important for freelancers and micro-organisations who find it difficult to find the time and money to participate in training. Moreover, project-based work and short-term contracts will make it necessary for audiovisual workers to be responsible for their own training rather than depending on the goodwill of an employer.

4.0   ACTIVITIES AND EFFECTS OF TRAINING ACTIONS

This section presents the analysis of the activities and effects of the first round of MEDIA Training Actions funded by the Creative Europe Programme (2014-2020). It offers a description of the +objectives, activities and participants as well as an analysis of the direct effects of the Training Actions. More specifically, this section covers:

- Objectives of the Training Actions;

- Geographical location;

- Project objectives, activities and participants;

- Gender and diversity dimension;

- Outputs and effects on individual participants; and

- Cost of participation.

The analysis in this section is then complemented by a qualitative analysis of the "pedagogies" of Training Actions (section 5) and by an analysis of the relevance and overall European added value of the Training Actions as a whole (section 6).

4.1   Objectives of MEDIA Training Actions

Supporting the audiovisual sector's capacity is a key priority of the Creative Europe MEDIA Sub-programme. Capacity-building is supported through the Training Action, which is one of 13 Actions funded as part of the MEDIA Sub-programme. The overall aim of the Action is to facilitate the acquisition and improvement of skills and competences of audiovisual professionals and the development of networks. The types of training and skills development supported by the Action help audiovisual professionals to use digital technologies, test new approaches to audience development, test new (innovative) business models and improve financial management.

The rationale behind Training Actions can be traced back to the Europe 2020 Strategy, which emphasises the importance of creativity, innovation, and entrepreneurship central to the cultural sector. The rationale for funding a broad range of capacity-building activities builds on the needs in the EU to provide 'more attractive framework conditions for innovation and creativity'. If more innovative and creative conditions are to be obtained, the sector will need to be supported in making comprehensive adjustments and improve the know-how within the sector.

As an illustration of the current challenge, the impact assessment undertaken to establish the Creative Europe Framework Programme notes that the know-how in the cultural and creative sectors in Europe are "currently very limited and dispersed in terms of how to promote cultural works and engage with new audiences in the digital age". There is thus a need for new competences, such as understanding of new business models and revenue streams, including marketing and audience-building skills, up-to-date ICT know-how, and better knowledge of issues such as intellectual property rights. These challenges will ultimately require the sector to develop new types of strategic partnerships.

The capacity-building activities supported under the MEDIA Sub-programme also feed into the Programme's Access to Market Action line, which reinforces the audiovisual

sector's capacity to operate transnationally (i.e. making the European audiovisual sector more competitive globally). MEDIA Training Actions should also form synergies with capacity-building actions for professionals of other cultural and creative sectors as defined in Article 2 of the Creative Europe Programme Regulation. This is further discussed in Section 6 of this report.

Although innovative practices are developing in some Member States, overall progress is slow and piecemeal, which justifies EU intervention to avoid fragmented progress. This in turn ties into the benefits of promoting networking, exchange of good practice and peer learning, as this would accelerate progress as well as bring economies of scale by pooling expertise across countries at a European level.

The MEDIA Training Actions are focused on supporting European professionals, who may also collaborate internationally. They include:

- **European actions** aimed at the acquisition and improvement of skills and competences for professionals to operate mainly in Europe; and

- **International actions** aimed at building expertise, knowledge and capacities for European professionals to network and collaborate with non-European professionals to enable access to international professional networks.

MEDIA's definition of 'audiovisual professionals' is quite broad and encompasses: producers, directors, writers, script editors, commissioning editors, distributors, exhibitors, sales agents, new media content providers, professionals from the animation industry, professionals from the post-production field, and professionals from legal, banking or financial sectors working with the audiovisual sector.[68]

The wide range of skills needed in the sector means that the Programme makes use of flexible tools, such as workshops and/or online coaching sessions, and dissemination tools, which can be used to strengthen the capacity of professionals and develop and disseminate good practice in a broad sense.

In particular, these measures aim to:

- Facilitate the learning and acquisition of new skills and expertise; knowledge-sharing from peers and senior professionals and best practices dissemination among participating professionals; and

- Enable access to international professional markets, the development of business models and the strengthening of international businesses and cooperation in the audiovisual sector.

These overall aims are in line with the responses to sector needs that were submitted to a public consultation in 2011 on the future of the MEDIA Mundus Programme. The Commission received 367 replies which indicated that stakeholders in the sector prioritised actions to facilitate co-productions, (the support of co–production markets and international co-production funds) and also indicated particularly high support for continuous training.

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[68] Creative Europe MEDIA Sub-programme Support for Training: Guidelines.

4.2   MEDIA Programme Training Actions 2014

Organisations from the following countries are eligible to participate in training
supported by the MEDIA Sub-programme (in addition to the 28 EU Member States):

- **Eligible as of 2014:** Albania, Bosnia and Herzegovina, Iceland, Montenegro,
Norway;

- **Eligible as of 2015:** Georgia, Moldova, Republic of Serbia, Turkey; and

- **Eligible as of 2016:** Former Yugoslav Republic of Macedonia, Ukraine.[69]

The MEDIA Training Actions provides two types of support:

- Training measures promoting the acquisition of skills and competences by
audiovisual professionals; and

- Knowledge-sharing, networks and the use of digital technologies.

Figure 4.1 Remit of MEDIA Training Actions

Creative Europe MEDIA Programme Training Actions

Fields of training	**Training activities to**
• Audience development, marketing, distribution and exploitation • Financial and commercial management, in particular to stimulate access to finance • Works development and production • Opportunities and challenges of the digital shift	• Facilitate the learning and acquisition of new skills • Share knowledge from peers and senior professionals • Enable access to international professional markets • Develop business models • Strengthen international business and cooperation in the audiovisual sector

Applicants can only apply for one of the two categories...

European actions facilitating the acquisition and improvement of skills and competences of professionals to operate, mainly in Europe.

International actions to build the expertise, knowledge and capacities of European professionals to peer, network and collaborate with non-European professionals to enable access to international professional networks.

Source: Adapted from EACEA[70]

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[69] For Georgian, Moldovan, Turkish and Ukrainian organisations, partial participation in the
MEDIA Sub-programme will be possible, i.e. participation in training, festivals, audience
development and market access activities.
[70] https://eacea.ec.europa.eu/creative-europe/actions/media/training_en

In 2014, Training Actions were allocated a budget of €7.5m. Training Actions are co-financed, i.e. the activities financed need to be matched as the financial contributions of EU funding cannot exceed 60%, unless they fall under the remit of international actions, in which case the EU can fund up to 80% of the total eligible costs of the action.

There was one funding round in 2014. The Programme initially granted funding to 59 out of 114 project applications received under the Training Action. However, the number of projects eventually supported was 58, as one selected project did not start. The majority of the projects also organise activities (actions) a second year (i.e. 2015/6), subject to approval of the first year's deliverables (including budget, work programme) by EACEA.

The 2014 Action was oversubscribed as the amount requested by the applications totalled €16.84m, while the Action in the end granted €7.98m (somewhat more than originally budgeted for).

The Action received applications from 23 countries.[71] The highest number of applications was received from Germany (17), France (14), Italy (12) and the UK (11). Notably, these four countries made up 54 out of 114 applications received (47%). These four Member States are also recognised as having the strongest audiovisual production capacity (along with Spain with six applications submitted).[72] The average success rate for Training Action applications was 52%. In contrast, the Access to Market Action funding round – where there are potentially synergies with the Training Action – was dominated by France, which submitted 19 out of 54 applications. Germany, which submitted 6 applications and Belgium with 4 applications. In total, 20 countries submitted applications.[73]

The remaining parts of section 4 will describe in more detail the characteristics of the 58 projects funded, starting with the geographical origin of projects and the topics covered.

4.3   Geographical location

Table 4.1 below shows an overview of the 58 projects' funding by the MEDIA Sub-programme (and co-funded by other sources). The co-funding ranges between 24% and 75% of project costs, with EU funds accounting for 51% of total project costs on average. The co-financing of projects varies significantly, with some beneficiaries applying for support from other EU funds, such as the Erasmus+ programme, while others seek national or sectoral funding.

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[71] Bosnia and Herzegovina, Belgium, Bulgaria, Czech Republic, Germany, Denmark, Estonia, Greece, Spain, France, Croatia, Ireland, Italy, Lithuania, Luxembourg, Latvia, Nigeria, the Netherlands, Poland, Portugal, Romania, Slovenia and the UK.
[72] COM(2011) 785 final.
[73] All results data taken from https://eacea.ec.europa.eu/creative-europe/actions/media/training/selection-results-support-for-training_en

Table 4.1 MEDIA Training budget breakdown

	Training Action	Country (co-ordinator)	Total cost (€)	MEDIA funding (€)	Co-funding (€)	% MEDIA funding
1	3D-VFX_VIA COLLEGE	Denmark	194,154	115,000	79,154	59%
2	ACE	France	509,105	260,000	249,105	51%
3	ANIDOXLAB	Denmark	69,779	41,500	28,279	59%
4	ARCHIDOC	France	100,302	60,000	40,302	60%
5	Art Cinema=Action+Management	France	290,000	145,000	145,000	50%
6	Animation sans frontières	Denmark	225,028	134,245	90,783	60%
7	ATELIER_Femis	France	299,675	130,000	169,675	43%
8	ATELIER_Filmakademie	Germany	528,801	125,000	403,801	24%
9	ATELIERS ANGERS	France	91,407	35,000	61,407	38%
10	BDC Discoveries	Bulgaria	46,582	25,000	21,582	54%
11	BERLINALE	Germany	832,136	270,000	562,136	32%
12	BEST	Estonia	97,477	73,477	24,000	75%
13	CARTOON Masters	Belgium	655,000	350,000	305,000	53%
14	CINEKID	Netherlands	80,625	36,875	43,750	46%
15	CPHLAB	Denmark	214,320	80,000	134,320	37%
16	Cross Channel Film Lab Training Programme	France	159,167	95,500	63,667	60%
17	Crossing Borders	Germany	173,032	100,000	73,032	58%
18	Digital Production Challenge II	Netherlands	100,000	50,000	50,000	50%
19	DigiTraining Plus	Italy	115,194	60,000	55,194	52%
20	Documentary Campus Masterschool	Germany	665,590	298,000	367,590	45%
21	Dok incubator	Czech Republic	183,333	110,000	73,333	60%
22	EAVE European Workshop Programmes	Luxembourg	1,162,000	460,000	702,000	40%
23	EAVE_PUENTES	Luxembourg	176,000	122,500	53,500	70%
24	Ekran+	Poland	283,388	143,000	140,388	50%
25	ENTER	United Kingdom	98,727	49,363	49,363	50%
26	EP2C	Belgium	171,435	99,300	72,135	58%
27	eQuinoxe	Germany	308,000	150,000	158,000	49%
28	Essential Legal framework	Germany	261,344	140,000	121,344	54%
29	EURODOC	France	440,010	232,200	207,810	53%

	Training Action	Country (co-ordinator)	Total cost (€)	MEDIA funding (€)	Co-funding (€)	% MEDIA funding
30	European TV Drama series lab	Germany	257,565	125,000	132,565	49%
31	EWA	France	105,000	60,000	45,000	57%
32	Ex oriente Film programme	Czech Republic	214,582	128,749	85,833	60%
33	FEATURE EXPANDED	United Kingdom	147,632	80,000	67,632	54%
34	Film festival development	United Kingdom	138,237	75,000	63,237	54%
35	FRAME	France	69,620	34,663	34,957	50%
36	IDFAcademy	Netherlands	106,780	49,000	57,780	46%
37	IF LAB	Belgium	143,893	85,000	58,893	59%
38	IMPACT PRODUCERS	United Kingdom	106,778	50,000	56,778.37	47%
39	Inside Pictures	United Kingdom	415,716	217,716	198,000	52%
40	LA POUDRIERE	France	125,851	64,345	64,506	49%
41	MAIA Workshops	Italy	253,964	126,800	127,165	50%
42	Media Business School	Spain	838,000	500,000	338,000	60%
43	Mediterranean Film Institute	Greece	300,000	140,000	160,000	47%
44	PIXEL LAB	United Kingdom	91,407	30,000	61,407	33%
45	Production Value	Netherlands	175,000	72,500	102,500	41%
46	SCREEN LEADERS	Ireland	287,972	150,000	137,972	52%
47	SCREEN4ALL	France	163,680	65,000	98,680	40%
48	ScripTeast	Poland	273,871	150,000	123,871	55%
49	SERIAL EYES	Germany	371,000	180,000	191,000	49%
50	Sources 2	Netherlands	447,710	243,300	204,410	54%
51	TALENTX	United Kingdom	92,615	53,600	39,015	58%
52	The Film garage	Italy	97,745	50,000	47,745	51%
53	Ties that bind	Italy	180,000	126,000	54,000	70%
54	TorinoFilmLab	Italy	840,550	342,300	498,250	41%
55	UP.GRADE	Germany	396,000	170,000	226,000	43%
56	VFX_IFB	Ireland	223,313	120,000	103,313	54%
57	ZagrebDox Pro	Croatia	51,000	24,000	27,000	47%
58	ZeLIG_ESoDoc	Italy	328,787	184,767	144,020	56%

Source: MEDIA Project data

As the previous table shows, the largest project budget belongs to EAVE European Workshop Programmes action (Luxembourg). This has a total budget €1,162,000 (of which the MEDIA grant makes up €460,000).

Other MEDIA Training Actions receiving large sums are:

- **TorinoFilmLab** (Italy) – TorinoFilmLab runs several activities, including training initiatives such as Script&Pitch, AdaptLab, Story Editing, and Audience Design. Its MEDIA Training Action has a budget of €840,550.

- **Media Business School** (Spain) – MBS is a non-profit organisation offering training, research and development to the audiovisual sector, and focusing on the business of the industry. The MBA MEDIA Training Action has a budget of €838,000.

- **Berlinale** (Germany) – also known as the Berlin International Film Festival. The Berlinale also organises annually Berlinale Talents, an initiative which brings together writers, directors, producers, cinematographers, actors, editors, distributors, production designers, composers, sound designers and young film journalists together with professionals from the international film industry. Its MEDIA Training Action has a budget of €832,135.

- **CPHLAB** (Denmark) is a talent development, training and production programme. With a budget of €80,000, it explores new, innovative creative processes in development and production, supporting alternative partnerships between film-makers across borders, and encouraging new financing methods and production processes focused on cross-sector partnerships and market access.

Figure 4.2 presents the countries co-ordinating organisations of each of the 58 Training Actions. The Training Actions are predominantly led by organisations from France, Germany and, to a lesser extent, the UK and Italy. In terms of the geographical distribution, France and Germany co-ordinate the largest number of Training Actions (11 each), followed by Italy and the UK (6 each). Of the countries eligible to apply for support under the Creative Europe Programme, 17 countries coordinate a Training Action, thus training support is somewhat skewed in favour of European countries with strong audiovisual sectors. Of the newer Member States, five lead a Training Action: Bulgaria, Croatia, Czech Republic, Estonia and Poland.

In terms of budget size, Italy, Luxembourg and the UK all co-ordinate projects worth a total of around or over €1m, while France and Germany co-ordinate Training Actions worth over €2m and €4m respectively. At the lower end of budget management, Bulgaria, Croatia, Estonia are responsible for coordination of the smallest Training Actions, worth under €100,000 in terms of total budgets.

Figure 4.2 Country of the coordinating organisation
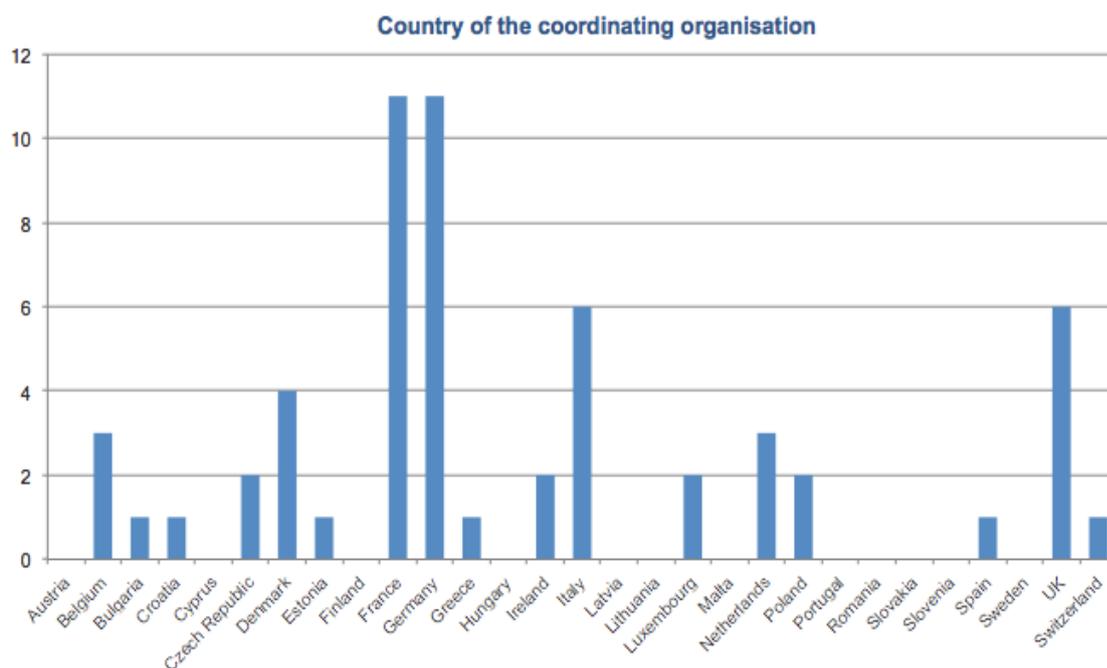
Source: MEDIA Project data

Table 4.2 Training Actions total budgets per action per country (co-ordinator)

Country	Number of projects (coordinator)	Total budget for Training Actions (€)	Average budget for Training Actions (€)
Belgium	3	970,328	323,443
Bulgaria	1	46,582	46,582
Croatia	1	51,000	51,000
Czech Republic	2	397,915	198,958
Denmark	4	703,281	175,820
Estonia	1	97,477	97,477
France	11	2,353,817	213,983
Germany	11	4,339,905	394,537
Greece	1	300,000	300,000
Ireland	2	511,285	255,643
Italy	6	1,816,239	302,707
Luxembourg	2	1,338,000	669,000
Netherlands	3	362,405	120,802
Poland	2	557,259	278,630
Spain	1	838,000	838,000
Switzerland	1	100,000	100,000
United Kingdom	6	992,386	165,398
TOTAL	**58**	**15,775,879**	**271,998**

Source: MEDIA Project data

Six organisations coordinate more than one project:

- **Deutsche Film- und Fernsehenakademie Berlin** (Germany): Serial Eyes and Up.Grade

- **EAVE – European Audiovisual Entrepreneurs** (Luxembourg): PUENTES Europe Latin America Producers Workshop and EAVE European Workshops

- **Erich Pommer Institut GmbH** (Germany): Essential Legal Framework 2016 and European TV Drama Series Lab

- **Irish Film Board** (Ireland): VFX: Screen to Screen and Screen Leaders

- **Stichting FOCAL Resource** (Netherlands): Digital Production Challenge II, and Production Value 2016: The European Scheduling & Budgeting Workshop

- **Via University College** (Denmark): Animation Sans Frontières and ANIDOX:LAB.

Although there is a certain concentration in terms of the co-ordinating country and organisation, there is greater diversity in the location of the training activities undertaken by the 58 Training Actions. Figure 4.3 shows the geographical spread of activities. Most of the co-ordinators describe in their work programme that they are planning to organise, or have organised, activities in more than one country, and often in two or three different locations across Europe (or in a handful of cases, internationally). Although countries with a larger audiovisual sector also constitute popular locations for training activities, there is a wider range of locations included than when looking at coordinating organisations' locations. The 'Other' locations bar shown in Figure 4.3 covers Albania, Argentina, Bosnia & Herzegovina, Canada, Kosovo, Norway, Singapore, Switzerland, Uruguay and the USA.

Figure 4.3 Country where activities take place
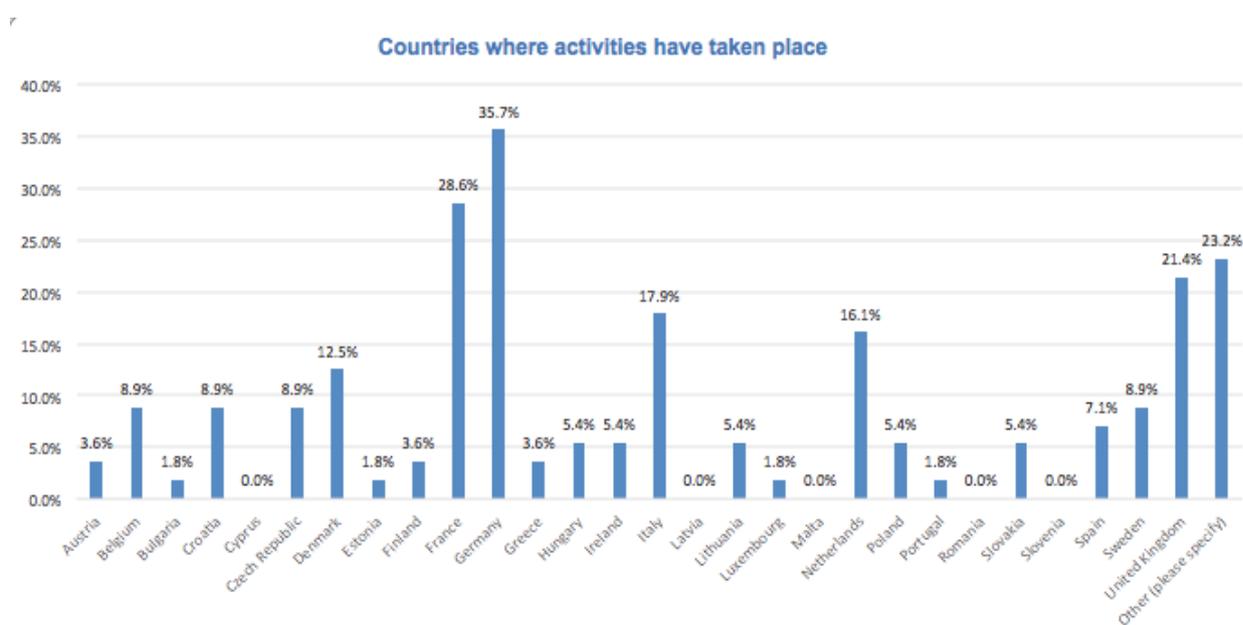
Source: MEDIA Project data

Typically, activities are organised through workshops, interactive training sessions or networking events, often with participants preparing material in-between. For example, the ACE Project, which is a one-year project-based training and networking programme targeted at experienced or very experienced feature film producers, is organising three residential workshops in three EU countries. In addition, the project hosts an "Annual Meeting" gathering the whole network in one place, roundtables and seminars in several EU countries open to local participants to get their feedback and to disseminate results, and a series of networking events held in the main market places of the year. These events are complemented by an active planned follow up of each participant by email and Skype. In this way, the various activities organised will cover around 10 countries, including Bosnia & Herzegovina, Canada Denmark, France, Germany, Ireland, Italy, the Netherlands, Sweden and Switzerland.

Five of the 58 Training Actions have been international actions, i.e. included (35-50%) nationals from countries not participating in the MEDIA Sub-programme.

Were Activities European or International?

8.6%

91.4%

- European Action: Nationals from countries not participating in the MEDIA sub-programme cannot represent more than 20% of participants.

- International Action: Nationals from countries not participating the MEDIA sub-programme should represent between 35% and 50% of participants
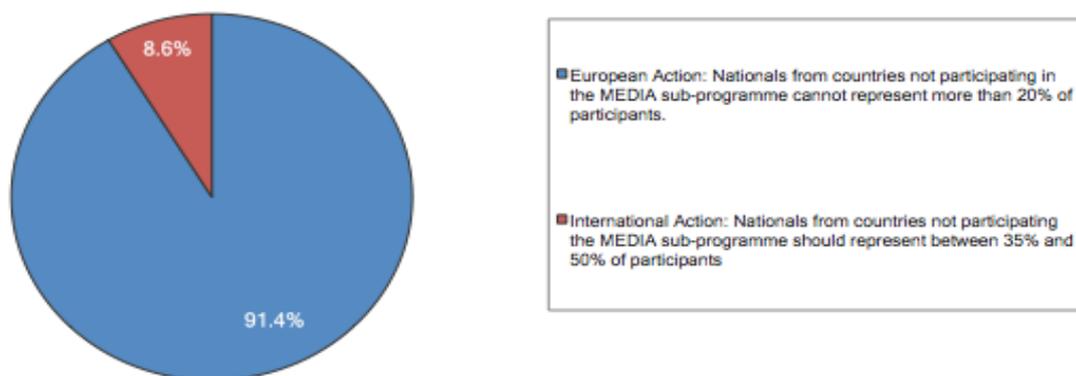
Figure 4.4 European or international action

Source: MEDIA Project data

The five international actions funded are:

1. **Ties that Bind**, which is a project-based yearly training programme including 2-weeks residential workshops and a market module in Asia. Ties that Bind aims to reinforce in-depth economic and artistic co-operation between European and Asian countries and facilitates the access of European professionals and their audiovisual works to the booming Asian market.

2. **Crossing Borders**, which is an international training initiative that aims to foster co-productions between Europe and Asia and produce exciting new content for the audiovisual markets of both continents.

3. **Puentes Europe Latin America Producers Workshop** (**EAVE**) – a training programme for producers to develop European-Latin American co-production (artistic and industrial).

4. **Berlinale Talents 2016** which is a creative summit and networking platform for

emerging film professionals at the Berlin International Film Festival.

5. **BEST** (**Baltic Bridge East by West**) which brings together two groups of film producers – one from EU and the other from the CIS countries, Georgia and Ukraine, each with a project and a view of co-producing with the other region respectively, and four participants without projects – to exchange information, training, and market intelligence, increase access to new markets, and build trust and long-term working relationships.

4.4   Objectives of Training Actions

Our review of the MEDIA Training Actions compared the objectives of individual projects against the programme objectives set out in the Creative Europe \Regulation:

- Support the capacity of the European cultural and creative sectors to operate transnationally and internationally;

- Promote the transnational circulation of cultural and creative works and transnational mobility of cultural and creative players;

- Reach new and enlarged audiences and improve access to cultural and creative works in the Union and beyond;

- Strengthen the financial capacity of SMEs and micro, small and medium-sized organisations in the cultural and creative sectors in a sustainable way, while endeavouring to ensure a balanced geographical coverage and sector representation; and

- Foster policy development, innovation, creativity, audience development and new business and management models through support for transnational policy cooperation.

Generally, the funded projects align well with one or more of the stated objectives. As Figure 4.5 illustrates, in particular the objective 'To support the capacity of the European cultural and creative sectors to operate transnationally and internationally', is widely reinforced through just under 90% of Training Actions. Equally, just over half of the projects aim 'To foster policy development, innovation, creativity, audience development and new business and management models through support for transnational policy cooperation', while just under half of the 58 Actions aim to 'To promote the transnational circulation of cultural and creative works and transnational mobility of cultural and creative players'.

Figure 4.5 Stated objectives of the Training Actions
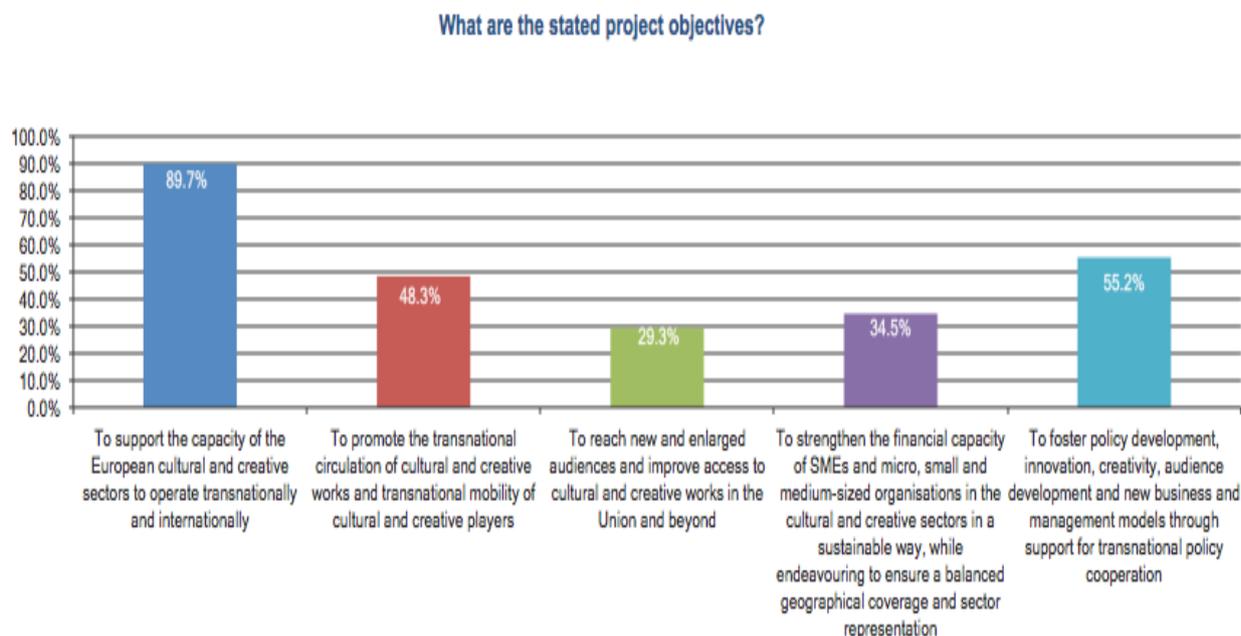
Source: MEDIA Project data

Overall, the five stated objectives are well supported through the project portfolio. Even the 'least supported' objective 'To reach new and enlarged audiences and improve access to cultural and creative works in the Union and beyond' is still fairly well covered, as it is directly relevant to just under 30% of the Training Actions.

As an illustration, we give an overview of some Training Actions in the text boxes below.

Case examples

- The **Inside Pictures** project is being implemented in response to continuous changes in the film industry, including increasing globalisation, rapid changes in technology and to funding sources, and an ever more competitive environment. Inside Pictures aims to: i) Develop participants' understanding of the global business of feature film, ii) Build participants' leadership skills, iii) Introduce participants to an extensive range of industry contacts, and iv) Raise participants' profiles in the industry. As such, this project meets the capacity objective as well as the transnational mobility and financial capacity objectives.

- The **Film Garage** project is a training workshop dedicated to the script development of genre film features - horror, thriller and road movie. The aim of the workshops is to take advantage of specific local national skills, and use these skills in order to share best practices, contacts, create new partnership in Europe to reinforce the EU industry sector. The project data argues that the European industry must use existing skills already available on the continent in order to i) be internationally competitive, ii) further develop skills between other AV sectors across the EU countries.

- The **Animation Workshop** project aims to foster the development and production in Europe of highly creative, innovative animation documentary projects with a strong artistic and social value, and the potential to be distributed throughout Europe and internationally. The project data describe animation as a very expensive film-making

Case examples

technique that most of the time, in Europe, which requires co-production between different European countries. All modules are therefore tailored for European professionals, with the side goal of creating long-lasting bonds between them.

- The **EP2C project** is organising a project-based workshop, mainly designed for producers and dedicated to post-production management. The rationale behind the organisation of this workshop is that the post-production stage of filmmaking, which very often represents as much as a quarter of the total film budget, is a very complex stage of filmmaking, and which involves several processes divided into two main workflows. The post-production stage is becoming ever more challenging due to constantly changing technology and the fact that co-production requirements split up the post-production process between several countries. In Europe, there exist training programmes for post-production at the national level. However, they mainly cover technical problems and do not adequately address main facts and "recipes" for a successful classical post-production process. In reality, however, post-production management of an international co-production more resembles a series of exceptions, which the EP2C project is looking to address.

We can also assess the stated objectives in the Regulation and of the funded projects with the objectives stated in the **Calls for proposals** text.

The 2013 Call for Training Actions specified the priorities of the MEDIA Sub-programme and which are largely in line with the Regulation objectives, namely to "*facilitate the acquisition and improvement of skills and competences of audiovisual professionals and the development of networks including the use of digital technologies to ensure the adaptation to market development, testing new approaches to audience development and testing of new business models*".

The 2013 call also explicitly stated the Training Actions under the MEDIA Sub-programme should provide support for the "*development of a comprehensive range of training measures promoting the acquisition and improvement of skills and competences by audiovisual professionals, knowledge sharing and networking initiatives, including the integration of digital technologies. Training activities favouring multidisciplinary cooperation within the audiovisual industry are encouraged*".[74]

In our assessment, the 58 Training Actions align well with the Calls for Proposals text. The elements mentioned above are all central to the selected Actions, in particular the formation of networks (to be sustained in the longer run though alumni activities) and, to a lesser extent, the testing of new business models (through support not only to audiovisual professionals but also to financial institutions, banks and SMEs).

The organisation of training activities that favour "multidisciplinary co-operation within the audiovisual industry" can take many forms. Our assessment suggests that the Training Actions tend to engage with industry in a number of ways:

- Enabling and encouraging participants to learn how to interact with industry – both in terms of gaining general networking skills, but equally to gain confidence and understanding of how to interact with potential financiers;

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[74] MEDIA Sub-programme Call for Proposals AC/S23/2013: Support for Training.

- Incorporating presentations of projects undertaken as part of the training to wider industry audiences; and
- Engaging industry in skills development activities too, involving them directly in training to improve, e.g. business and management skills.

4.5   Skills provided by Training Actions

4.5.1   Topics covered by Training Actions

Based on survey data and interview feedback, the topics covered by the Training Actions have been compared to the main skills needs identified in section 3, namely *craft-specific skills*; *ICT/digital skills*; *business management skills*; *leadership, innovation & entrepreneurship*; and *interpersonal, social and cross-cultural skills*.

Online survey respondents were asked what kind of **skills** the training they participated in mostly focussed on. The figure below shows the breakdown:

Figure 4.6 Skills focus of Training Actions

17. What kind of skills did the training mostly focus on?

- 42% - Craft-specific
- 28% - Entrepreneurship / business management
- 17% - Other, please specify
- 9% - Interpersonal, social and cross-cultural skills
- 4% - ICT/digital
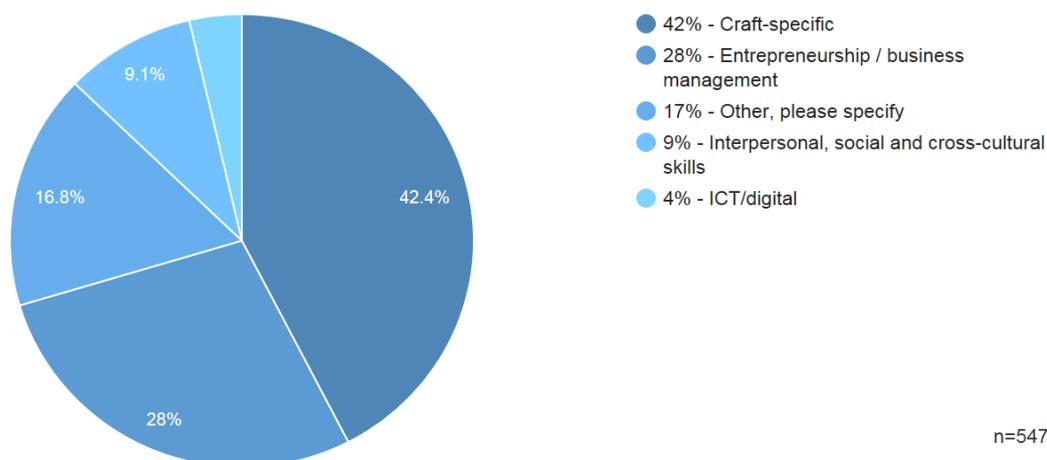
n=547

Source: Participant survey (n=547)

Craft-specific skills are by far the most important ones (42%) in particular considering the focus of related skills within the 'Other' response (17%) which covered many craft-specific skills too, such as scriptwriting, cross-media approaches, screenplay writing, audience design, and international productions. A smaller proportion of the 'Other' responses fell under the *Entrepreneurship and business management category (*financing, intellectual property and legal matters) or *information and communication technology and digital skills* (i.e. web projects).

Over a quarter (28%) of respondents named *Entrepreneurship and business management* as the focus of the training in which they participated, while 9% considered the focus to be on *interpersonal, social and cross-cultural skills*. Only 4% named *information and communication technology and digital skills* as the focus.

In practice, however, most of the participants would have been exposed to training designed to offer a combination of these skills; often to be applied on specific projects. Our interviews with training providers indicate that the training schedule offered through the projects are preceded by different kinds of market research to ensure that relevant skills needs are met. This research may include surveys of participants and alumni, collaboration with other MEDIA Training Actions or – in the case of Screen Leaders – one-to-one interviews with participants to understand in detail their needs and expectations. It is also worth noting that "innovation" is often a feature of other topics, as well as being a topic in itself. For example, "craft-specific skills" can include skills in using innovative forms of production or new technologies, whilst "entrepreneurship" can include a focus on innovative forms of financing of audiovisual productions.

Figure 4.7 provides a breakdown of the specific **subjects covered in training.** Respondents were able to select more than one option.

Figure 4.7 Subjects covered in Training Actions
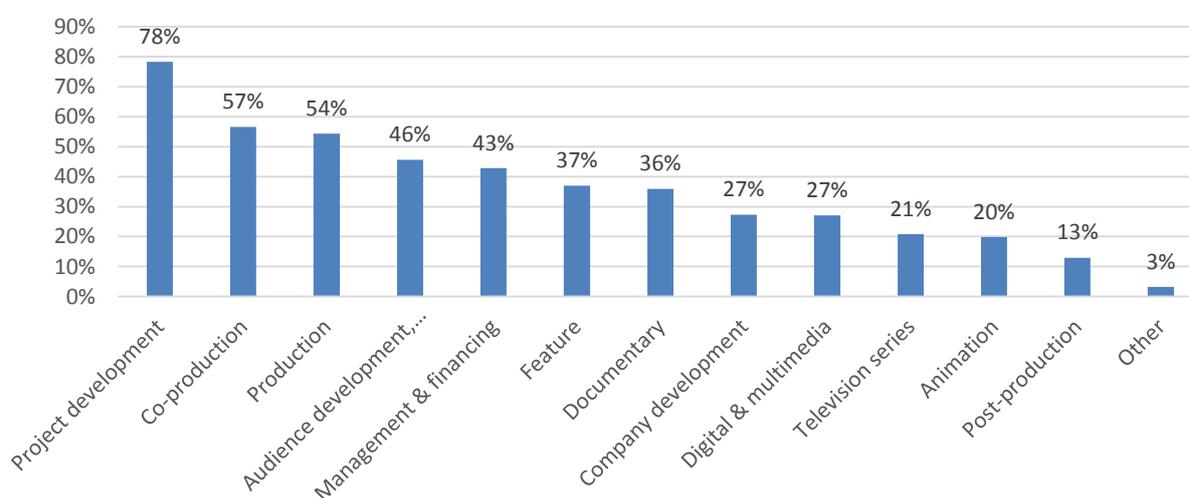
Source: Participant survey (n=535)

Project development is by far the subject most frequently covered in training (78%) followed by *(co-)production* (57%). *Audience development, marketing, distribution and exhibition* also feature prominently (46%), which perhaps shows that while formal distribution may not be a key topic in many training courses, training providers do recognise the importance of the relevant steps to be taken just before distribution such as audience development and marketing.

In terms of types of audiovisual works, *features* (37%) and *documentaries* (36%) are mentioned relatively frequently by respondents, whereas *TV series* (21%) and *animation* (20%) are mentioned less often – which makes sense as these are somewhat more specialised. Other subjects cited include pitching, video-on-demand, screenwriting, writers' rights, licencing, storytelling, fundraising, transmedia, book adaptation and trailer development.

The study's interviews and case studies also indicate that the portfolio of 58 Training Actions are well aware of each other, and support each other's marketing and 'division of labour' in order to provide an as broad portfolio as possible. For example, Maia Workshops has developed as the entry programme in the European offer of training opportunities for young professional producers. The workshop series has thus positioned itself before EAVE and ACE, two producer-training programmes with which the foundation closely collaborate to design and offer subsequent steps in the learning process. Maia Workshops' positioning is to an extent also geographical, as it focuses on supporting professionals in Central Eastern/Mediterranean Europe.

4.5.2   Potential skills gaps

A smaller number of survey respondents also highlighted **skills gaps** that in their view are not (yet) sufficiently covered by the Creative Europe Training Actions. These broadly covered issues relating to:

- **Length or quantity of training:** e.g. a handful of respondents called for the scaling up of the number of training courses on offer or providing continuous support to the same cohort of training participants.

- **The development of business skills**: including providing more industry-relevant vocational training, how to operate in a commercial setting without public support, how to engage with production companies rather than with broadcasters, explorative formats including 'think-shops' addressing the issue of European global competitiveness, customer acquisition channels and distribution, big data and its impact on entrepreneurship, specific business models for animation films, including stop-motion.

The interface between creative and commercial skills has also been widely raised by training providers themselves. We provide two examples below.

Case examples
- For the organiser of **Maia Workshops**, Fondazione Film Commission Genova, the most relevant problem faced by the sector is access to finance. Given the considerable cuts experienced by the sector as a result of the crisis, the ability to access funding had become more and more relevant during the years. Alternative funding also plays in this context a relevant role: e.g. crowdfunding. There is a clear gap in the training market in this respect – for example, in Italy, film schools and universities do not provide tailored training for producers. As a result, there is little awareness of aspects that are not related to the creative process (e.g. financing marketing etc.).   - The **ENTER** project is largely aimed at the financial sector rather than audiovisual professionals. ENTER has organised workshops for financial organisations (banks and business angels) to aid opportunities for investment in the audiovisual sector (film and games). According to ENTER, there is a gap in terms of mutual understanding between the financial and audiovisual sectors. If investment is to be made in film and games, there is a need to bridge this..

- **More thematic training**: e.g. more support to documentaries and short web series and video-on-demand distribution for producers, more transmedia training and eco-friendly film-making.

- **Diversity**: including encouraging diversity in the TV industry and encouraging linguistic and cultural diversity of certain Southern Europe countries.

Interestingly, the skill gaps mentioned are rather specific ones, whereas digital skills and interpersonal skills, which we consider key skill needs but which seem to have been the focus of relatively few Training Actions (see further above) are not explicitly mentioned. This suggests that even if the selection of training topics is not evenly balanced between the different skill clusters identified for this report, they may well match the skill needs of the target group, regardless of the specific exceptions listed above.

4.6 Activities of Training Actions

Similar to the *objectives* of the Training Actions, the activities undertaken as part of the training have also been wide-ranging and multiple (see Figure 4.8 below). The four types of activity shown in the figure below corresponds to the instructions in the 2013 Call for proposals as listed above (focusing on networks, digitalisation and new business models).

Figure 4.8 Activities undertaken
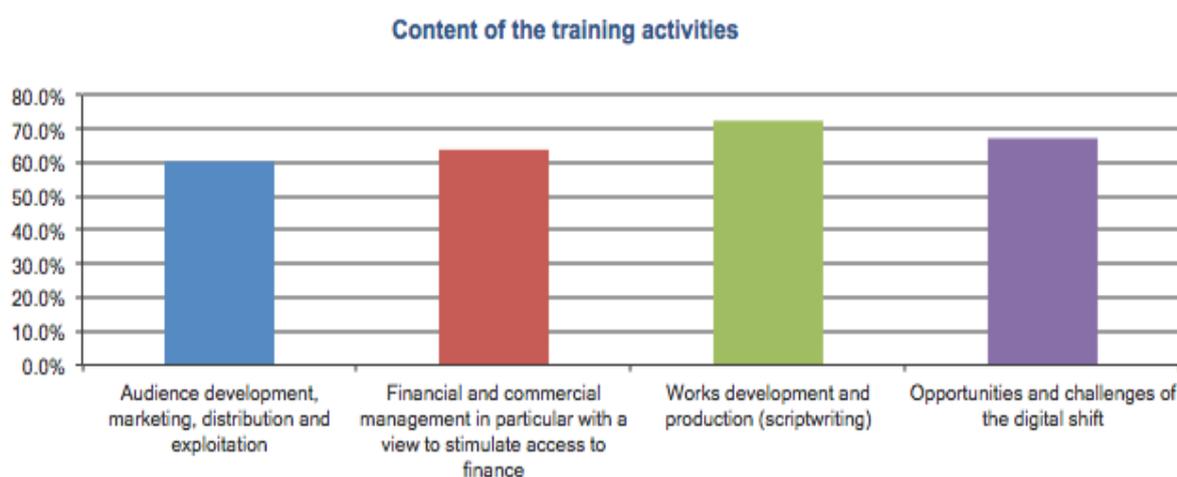
In terms of **under-represented activities or needs that could be given further support through the Sub-programme**, comments arising from our wider stakeholder interviews suggested a number of areas.

Some of the strengths of European training have been weakened by the current configuration of EU programmes, particularly Erasmus+ and MEDIA. In particular, the Knowledge Alliances (transnational, structured and result-driven projects, notably between higher education and business) set up under Erasmus+ were very useful. There is a need to bring in a research and innovation element and link this to existing training initiatives. One suggested approach of doing this is through supporting incubators for audiovisual organisations and SMEs to support new ideas in the field and training alike.

Others emphasized the need to support young professionals. In particular, offering training opportunities to professionals in the time immediate after graduation is crucial. Specifically, several interviewees who had experience of the Initial Training Scheme (a MEDIA programme discontinued with the creation of the Creative Europe Programme)

believed this initiative had filled an important gap in the market for young professionals. The Initial Training Scheme provided support to encourage networking and mobility through collaboration between European film schools, training institutions, and with the participation of partners from the professional sector.

Compared to the US, there is little alumni financing to encourage young professionals to continue networking. Instead, it was argued, media training was "too focused on recycling professionals".[75]

Most commonly among the wider stakeholder community and training providers alike, it was regarded that there is a need to – if not directly address – then more closely consider, the balance of activities within the training portfolio. Naturally, there is competition for funding between different parts of the audiovisual sector (e.g. games industry versus TV industry). To a certain extent, this can be addressed by designing common approaches and by exchanging knowledge between sub-sectors that is useful to the audiovisual community as a whole. That is, training can be designed to be broad enough to take into account different needs. Issues like these include intellectual property rights and new modes of distribution platforms. Even within particular sub-sectors, the level of sophistication and professional abilities differs – creating a need to support training that can facilitate improvement overall:

"Cinemas in the Europa Cinemas network encompass a diverse range of business models (from family-run, single-screen cinemas to multiplexes), with different skill needs and gaps. Some skill gaps are more evident in small cinemas run by small, multi-functional teams with a limited access to training programmes." [76]

Examples of cross-sector training already exist within the training programme, as shown in the text boxes below.

Case example: Screen Leaders

Screen Leaders encourages the inclusion of new AD industries such as games, to provide peer-to-peer learning. It believes that newer and more traditional parts of the audiovisual sector can learn from each other in training. The games industry, for example, has a lot of knowledge concerning new business models and alternative funding sources, while traditional AD sectors can teach the games industry on how to effectively develop long form storytelling and visual storytelling skills, how to manage and develop a slate and develop and retain talent. The VFX and Animation industry is very commercially focused on the marketplace, this can benefit traditional film and TV companies that can be too dependent on soft money funding source. Companies developing new forms of digital marketing and distribution strategies can help to develop the skills of traditional film and TV companies to build audience for the projects, this in turn builds their businesses. In addition, the screen industries benefit from learning outside the industry through business leaders in other industries who also share their knowledge on the programme.

Source: Project documentation and interviews

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[75] Interview feedback.
[76] Interview feedback.

Many of the Training Actions are based on the concept that the participants 'bring their own' personal project, e.g. scripts, or other concrete projects, to develop under the supervision and support of the official training (see box example below). According to interviewees, this is a well-tested and effective type of training. Providing training directly related to the job is also a recommendation of the European Skills Council for employment and training in the Audiovisual and Live Performance sectors as it recommends that (both at EU and national levels) "partnerships between education and professional partners that develop on-the-job learning schemes should be supported".[77]

Case example: ScripTeast
ScripTeast is a programme designed for experienced screenwriters from Central and Eastern Europe. It helps develop scripts and improves writers' networking and marketing skills, introducing them to the European film industry and market. A year-long programme consists of three face-to-face sessions and two online sessions with creative advisors: worldwide known screenwriters, directors, sales agents and producers from all around the world. The first face-to-face session takes place in Poland and the second during the Berlinale. The final session takes place at Cannes Film Festival, where ScripTeast Award bearing the name of legendary director and scriptwriter Krzysztof Kieslowski, is given to the best script. While first session and two online sessions are dedicated to seeing a script from the multiple perspectives of creative advisors and creating connections between the best writers in the region, sessions during Berlinale and Cannes Film Festival are focused on international promotion of scripts and their authors. ScripTeast is concentrating on the most crucial moment of movie creation – the script. It is the first, and remains the only training programme specifically aimed at scriptwriters from Eastern Europe. It takes into consideration the chances and barriers scriptwriters in this part of Europe encounter and that is why it can help them more effectively. The programme aims to create world-class scriptwriters from local scriptwriters, give them a chance to confront their ideas with acclaimed peers from the West and thus facilitate the circulation of East European works to Western Europe.

Source: Project documentation and interviews

In line with the common use of the 'bringing your own project' approach to training, our review found that over half (56%) of the 58 Training Actions were linked to an existing initiative by the participants, whilst just over one-fifth of projects were linked to a festival or other relevant event. Common festivals which were linked to the training included, in particular, the Berlinale. In some cases, training providers also link training with festival attendance. For example, the first AdaptLab workshop, organised by the Torino Film Lab, took place in Locarno (Switzerland) thanks to the collaboration with Festival del Film Locarno's initiative *L'immagine e la parola*.

As the study team were unable to establish training links in over one-fifth of projects (since it was unclear from the project documentation), it is likely that the approach of linking the training to external events was more common than indicated in Figure 4.9.

Figure 4.9 Project links

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[77] European Skills Council for employment and training in the Audiovisual and Live Performance sectors (2016), Trends and skills in the European audiovisual and live performance sectors.

Links between training activiteis and festivals
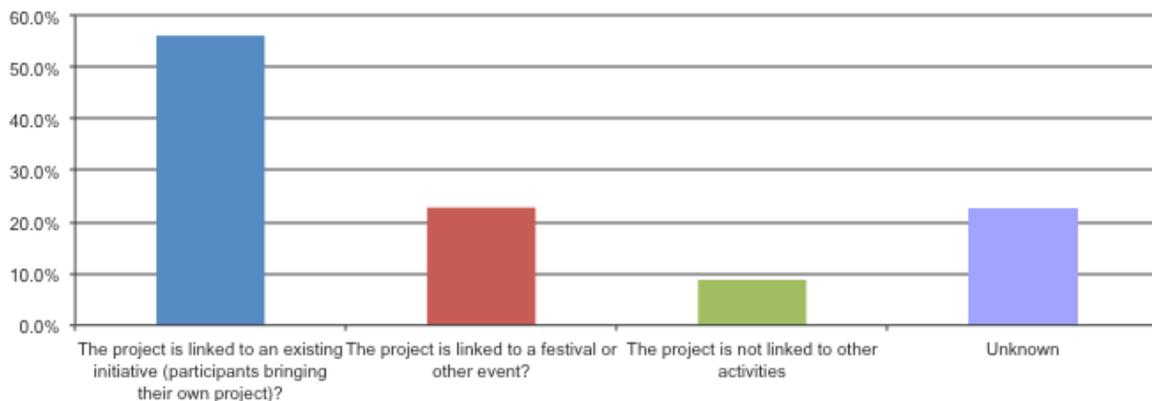
Source: MEDIA Project data

Links between Training Actions and festivals have, for example, been made to create opportunities for networking for participants or for showcasing the results of the training, like for example in 3D Character Animation project.

Case example: 3D Character Animation
The 3D Character Animation course takes the predominantly European participants through all the components of 3D animation. The course culminates in a four-week final project, which is to be each participant's showreel masterpiece; a 20-30 second animated short film or computer game introduction, after which the participants will be ready and fully equipped to enter the industry as junior 3D animators. The course ends with a Project Presentation and Recruitment Event.

In terms of the fields of activities covered, our review of the 58 Training Actions found that the most common project activity was indeed project development, used by over three-quarters (78%) of projects. Over half of the 58 Training Actions also undertook activities to facilitate and support the production of features (60%), co-productions and documentaries (55%), audience development, marketing, distribution & exhibition (53%) and documentaries (52%).

Table 4.3 Fields of activities undertaken through Training Actions

Field of activities undertaken	% of projects
Project development	**78%**
Company development	35%
Production	43%
Co-production	**55%**
Post-production	31%
Audience development, marketing, distribution & exhibition	**53%**
Management & financing	47%
Animation	35%
Documentary	**52%**
Digital & multimedia	**55%**
Television series	35%
Feature	**60%**

Source: MEDIA Project data

Of course, Training Actions have mostly employed a combination of activities, such as
Audience development, marketing, distribution & exhibition in tandem with craft-specific
and/or tech-based skills. For example, the European TV Drama series lab is a two-
module training programme for leading players in the European television industry, which
combines activities through teaching, such as project and company development,
production, co-production, post-production, audience development, marketing,
distribution & exhibition, management & financing – and of course television series.
Similarly, the Cinekid Script LAB – a four-month script-training programme for writers
with a children's film project regardless of the current stage of development – tailors its
coaching to participants. In this way, it may cover fields such as project development,
co-production, animation and feature activities.

4.7   Participants

The study identified the profile of participants in Training Actions based on analysis of
two types of data:

- Progress reports (deliverables) submitted by the project promoters to EACEA. These
  contained descriptive material developed by the training providers and which
  provided qualitative and some quantitative data on the project objectives and work in
  progress.

- A survey of participants attracted a total of 640 responses across the 58 Training
  Actions. However, as we do not know the total number of participants benefiting from
  MEDIA training (there is no central database of contacts) we cannot calculate the
  response rate of the survey.

The Training Actions are free to choose the method by which they promote the
availability of training courses, invite applications from professionals and select
participants (albeit within the parameters set out in programme Guidelines).[78] As a
result, the method of selecting participants varies and consistent data is not collected on
the overall level of demand. However, none of the project promoters that were
interviewed reported any difficulty in filling places and a majority reported that demand
for training exceeded the number of places available.

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[78] Creative Europe MEDIA Sub-programme Support For Training: Guidelines.

Our review, which provides a snapshot of one year of training, indicates relatively broad participation in terms of European nationalities participating in the training activities in 2014 (see Figure 4.10 below). This entailed a 'head count' of the nationalities of the participants for all Training Actions (where this data was available and quantifiable).

There is a certain domination from the largest countries with the largest audiovisual sectors, in particular from the UK, Germany, France and Italy, whose nationals participate in more than 50% of Training Actions. The only Creative Europe country which did not feature any participants from was Montenegro. In addition to the nationalities range presented in the below table, a number of non-Creative Europe countries have also participated in projects: Argentina, Armenia, Australia, Brazil, Canada, Chile, Colombia, Ecuador, Egypt, Georgia, India, Iraq, Israel, Japan, Kenya, Kosovo, Lebanon, Malaysia, Mexico, New Zealand, Palestine, Paraguay, Russia, Serbia, Singapore, South Africa, South Korea, Switzerland, Thailand, Turkey, Ukraine, the USA and Venezuela.

Figure 4.10 Nationalities participating (snapshot of 2014 training)
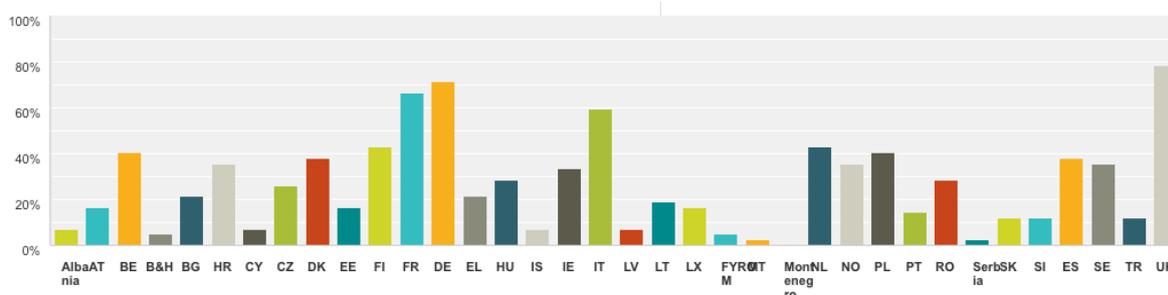
Source: MEDIA Project data

The figure below show a breakdown of participants per country for activities undertaken in 2015. The Creative Europe countries are colour-coded according to their capacity for audiovisual production ("High", "Medium" and "Low").[79] In general, capacity for audiovisual production is correlated with population size: the five High-Capacity countries are the five EU Member States with the largest population (DE, FR, UK, IT, ES) and the Medium-Capacity countries are mostly, although not all, Member States with medium-sized populations (AT, BE, FI, IE, NL, PL, SE). Those countries that joined the EU since 2004 and the non-Member States are more likely to be Low-Capacity countries than EU15 Member States of the same size.

The data show that **participation is broadly correlated with capacity for audio-visual production**. Most participants are from the largest five Member States, which are also the High-Capacity countries. Of the six countries with the next highest levels of participation, all but one are Medium-Capacity countries (NL, PL, BE, DK, SE); the other is Croatia.

There are exceptions: **some Low-Capacity countries are well-represented amongst participants**, namely, Croatia, Greece, Lithuania, Hungary, the Czech Republic and

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[79] Definitions of High, Medium and Low Capacity countries provided by the European Commission DG CNECT.

Norway. Moreover, these countries are not common destinations of the organised activities – compared with Figure 4.3.

Figure 4.11 Number of participants per country (2015)

Number of Participants (low, medium, big production capacity)
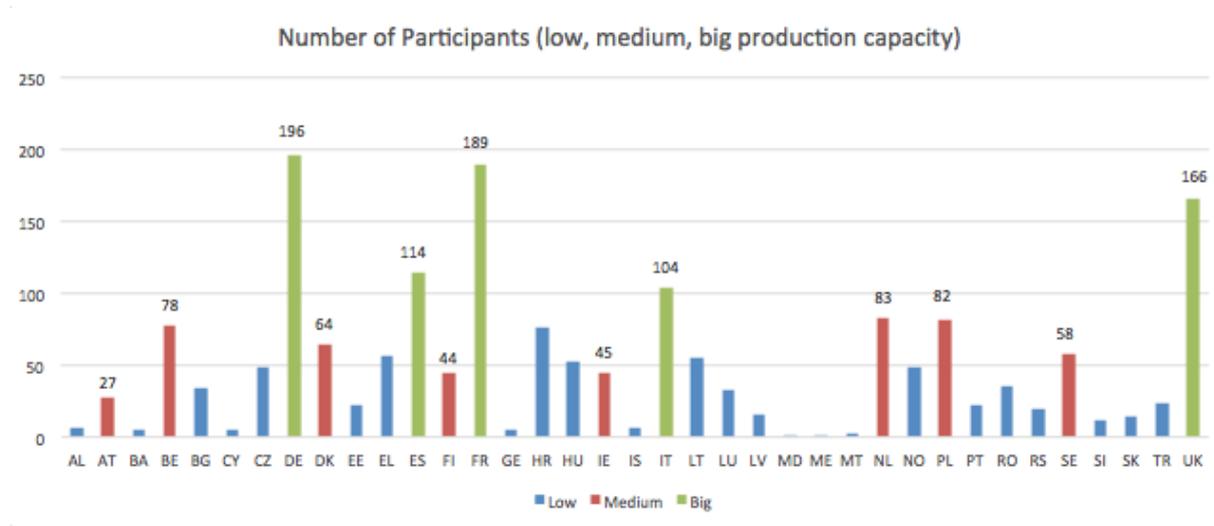
Source: Final report data (EACEA)

As stated above, countries' capacity for audiovisual production is correlated with their population size. It is therefore important to look at the level of participation relative to population size. The figure below therefore highlights the level of participation for every 1m of population in the participating countries.

Overall, **there is little, if any, correlation between a country's level of participation in the programme and its capacity for audiovisual production**, once population size is taken into account:

- **High-Capacity and Medium-Capacity countries are not over-represented as participants**, once population size is taken into account. None of the High-Capacity countries feature in the top ten countries and none of the Medium-Capacity countries feature in the top five.

- In fact, **some Low-Capacity countries are well represented** relative to their population size, namely Luxembourg, Lithuania, Iceland, Croatia, Estonia and Norway.

- In contrast, **some other Low-Capacity countries are poorly-represented** relative to their population size including medium-sized countries, e.g. Romania, Portugal.

There is also a broadly negative correlation between population size and participation: **small countries have higher levels of participation than large countries relative to population size** at least amongst the Member States and EEA countries. This correlation has been observed in other evaluations of EU programmes.[80] It may reflect two factors: first, the fact that audiovisual professionals in small countries may be more used to co-operating internationally as part of their working life; second, the existence of a dedicated Creative Europe Desk in each country, meaning that promotional activities by

[80] See, for example: Ecorys (2011), Interim Evaluation of the Culture Programme 2007-13, p.52.

the Desks in small countries can reach a higher proportion of the audiovisual sector in those countries.

The data also suggest that **participation is higher in the EEA countries than in the other non-Member States participating in the programme**. Indeed, Iceland (3rd) and Norway (8th) were amongst the best represented countries relative to size, whilst the other non-Member States were amongst the least represented. This may reflect the EEA countries' longer history of participating in EU programmes in support of the audiovisual sector, as well as their greater capacity for audiovisual production than the other non-Member States.

Figure 4.12 Participation relative to population size (2015)
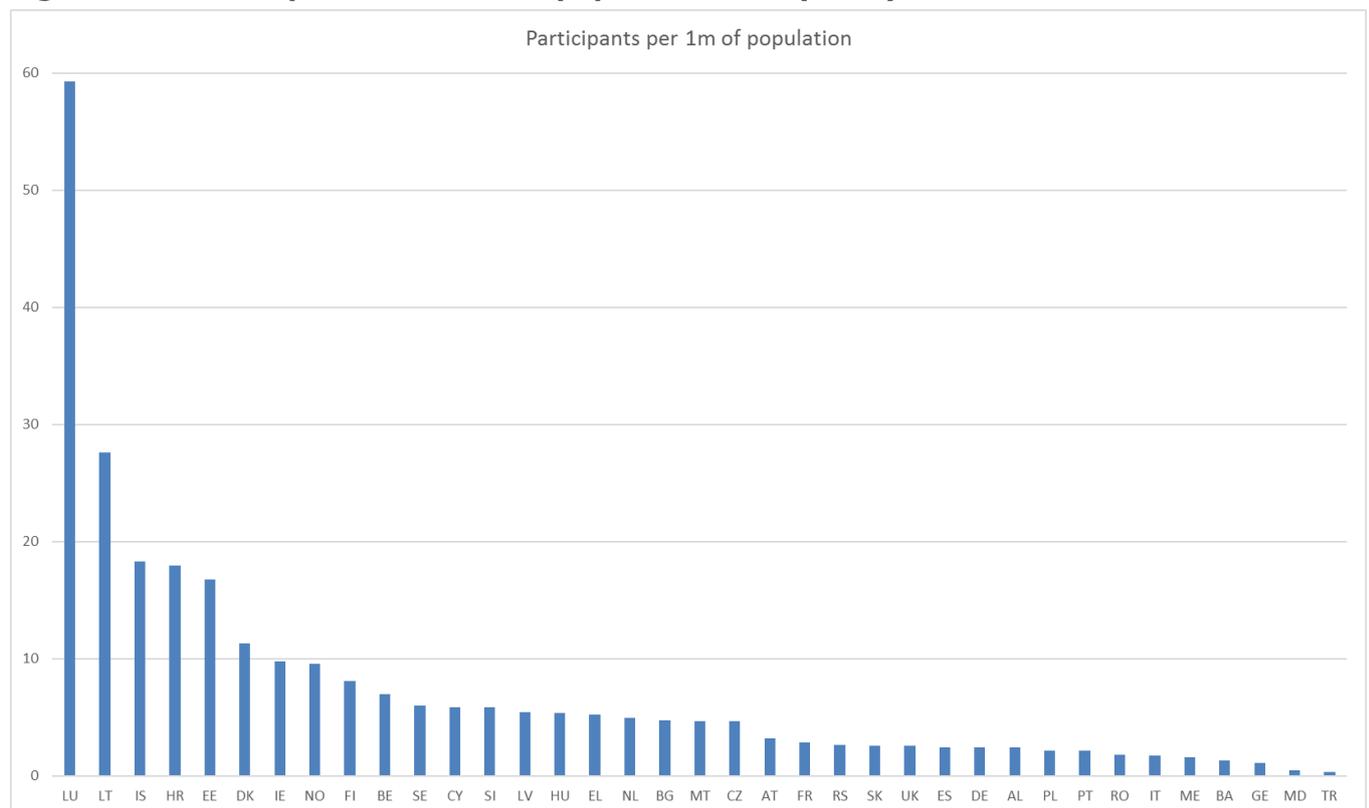
Source: Final report data (EACEA)

The figure below shows what type of organisation that respondents work for.

Figure 4.13 Types of organisation employing participants in Training Actions

3. What type of organisation do you work for?

Legend:
- 33% - Self-employed
- 31% - Micro-enterprise (1-9 staff)
- 12% - Small enterprise (10-49 staff)
- 5% - Medium-sized enterprise (50-249 staff)
- 5% - Not employed/self-employed
- 4% - Large enterprise (>250 staff)
- 3% - Other, please specify
- 2% - Cultural institute/foundation
- 2% - Professional association
- 2% - Non-governmental organisation
- 2% - Educational institution
- 0% - Research organisation
- 0% - Government ministry

n=615
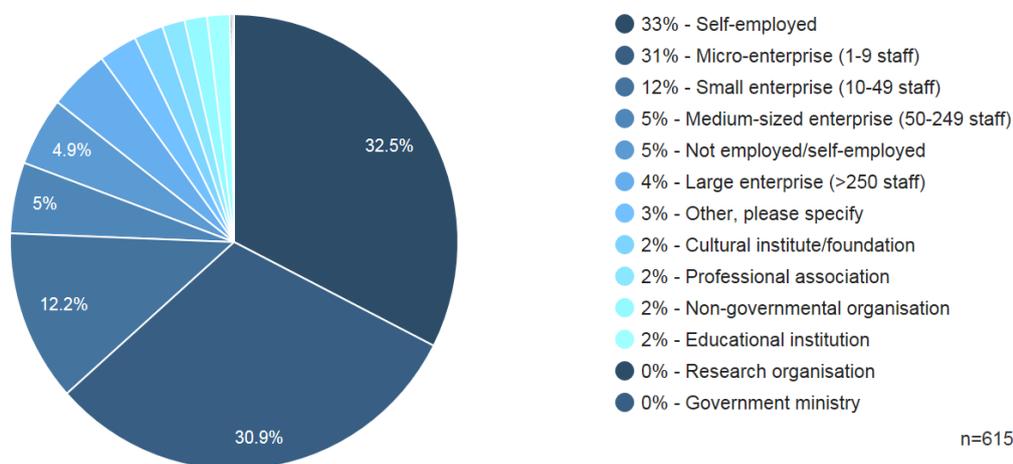
Source: Participant survey

One third of respondents are self-employed, with a further 31% working for micro-enterprises with fewer than 10 members of staff. Another 12% work for small and 5% for medium enterprises.

A majority of 64% of respondents work in film, whereas a quarter works in television with the rest working in other parts of the audiovisual sector such as gaming or education.

In terms of occupation, 42% out of 615 respondents work mainly as producers, 22% as directors, 7% as writers, 3% in animation and another 3% distributors. The relatively low share of distributors is worth mentioning, given feedback obtained throughout the study on a perceived neglect of distribution compared to production in Creative Europe Training Actions.

Participants were also asked whether they had previously participated in MEDIA-supported training before 2014, i.e. they were "repeat participants". Some 47% confirmed that they had (out of 615 respondents). Within the current funding period since 2014, 28% out of 530 respondents had first participated in training in 2014, another 32% in 2015, and 41% of survey respondents had first participated in training in 2016.

Each of the 58 Training Actions has aimed its activities at rather **specific target groups**. Most often the participants who attended Year 1 (2014/5) of the training also partake in Year 2 (2015/6). However, in some cases, the project work programmes indicated participants for the second year were yet to be confirmed.

Largely, the projects were specific in articulating their target groups, specifying particular audiovisual professional groups or occupations, focusing either on those working within the creative sphere (scriptwriters, film-makers, directors) or professionals in the financial

sphere (private investors, financial intermediaries, bankers, managers of venture capital funds, lending and crowdfunding platforms, representatives of business angel networks, VCs and other investor/lending organisations).

The majority of Training Actions (almost 85%) have been designed to serve participants with intermediate experience (5-10 years). As Figure 4.14 shows, just over half of projects have also catered for senior audiovisual professionals (+10 years' experience), while 40% of projects were also open to more junior professionals (<5 years' experience).

Generally, participants have been requested to submit an application. However, some Training Actions have chosen to invite participants fitting certain criteria, e.g. the organisers have invited particularly prestigious audiovisual professionals to participate in the training (generally free-of-charge).

Figure 4.14 Level of experience of participants
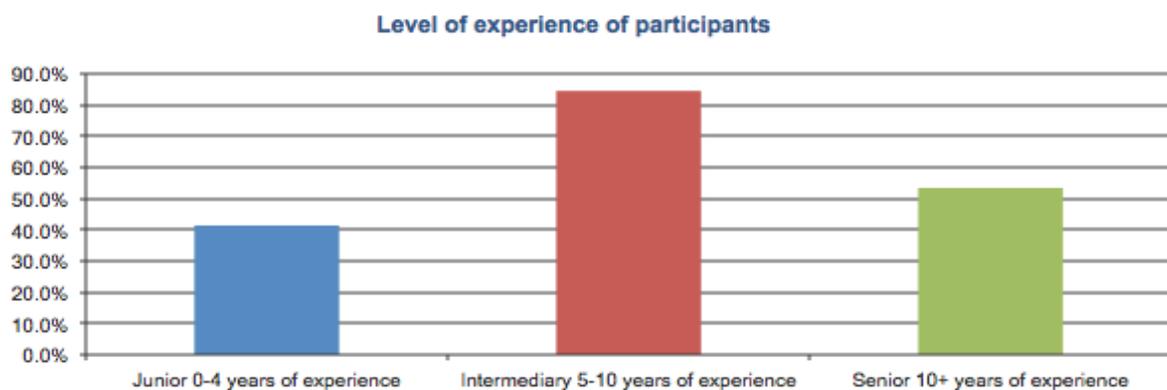
Source: MEDIA Project data

Each of the organisers using an application-based approach to participant selection provides an overview of the criteria for selecting successful candidates in the work programme submitted to the Commission. Generally, these tend to focus on the quality of the potential participant, specialisms and the level of seniority of the candidate. However, in specific cases geography/nationality also plays a part (e.g. as a way of encouraging participation of professionals from countries with smaller audiovisual industries).

The project data also provide evidence of organisers actively engaging in the application process so as to achieve a fair balance of participants. The TalentX project, for example, reported an imbalance in the number of professionals applying from certain countries and regions. In particular, the Netherlands, Scandinavia and the UK generated high numbers of applicants and participants, while southern European countries such as Spain, Portugal and Greece did not generate any applications, something which the Dutch organisers aim to address for future versions. The coordinator suggested several reasons for the imbalance: first, partner organisations are from the higher-represented countries and therefore the marketing message reached out through their established networks faster than through the other territories in which marketing routes did not already exist; second, the Netherlands was the 'home country' and therefore attracted a high percentage of applicants; third, some countries such as Sweden and the UK have very structured national and regional film funds and therefore a higher volume of related

'talent developers' within these structures when compared to, for example, some southern European countries such as Spain, and 'word of mouth' spread faster among such networks.

4.8   Gender and diversity

4.8.1   Context

In the EU, the audiovisual sector employs over 1.2 million people. According to Eurofound, just under half (46%) are women, 82% have employee status and 75% are working full time.

At a European level, there is a Framework of Actions on Gender Equality that was adopted by the social partners represented in the sectoral social dialogue committee for the audiovisual sector. The framework clarifies that "*all persons working within the audiovisual sector in the EU are entitled, among other rights, to equality of opportunity in terms of training, lifelong learning and career development, and to equal pay for equal work or work of equal value*". This statement applies to everyone "*irrespective of their gender, sexual orientation or marital status*".[81]

There is an uneven representation of women and of minorities within the audiovisual sector, with some sub-sectors better represented than others. For example, the European Women's Audiovisual Network (EWA) recently (2016) published research findings on gender equality in the European film industry, and which undertook comparative research from seven European countries: Austria, Croatia, France, Germany, Italy, Sweden and the UK. EWA's findings conclude that "the structure of Europe's film industries does not support gender equality". Gender inequality is being perpetuated by a combination of factors, including the competitive habits of the marketplace, contemporary industry structures, the impact of new technologies and false assumptions about women's abilities and business risk.

The report makes a number of recommendations, including to Creative Europe's MEDIA Sub-programme, which EMA believes should actively address gender equality issues in all their policies, measures and support programmes: these should include training, distribution, exhibition, festivals and audience support, as well as media literacy initiatives.[82]

This study can also make a number of observations with regards to diversity and gender within the MEDIA Training Actions.

4.8.2   Diversity

The review of the project data, as well as interviews with MEDIA training providers highlight that diversity is an inherent part of the training. We provide some illustrations of this point below:

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[81] http://www.eurofound.europa.eu/observatories/eurwork/articles/industrial-relations/social-partners-in-audiovisual-sector-promote-gender-equality
[82] European Women's Audiovisual Network (2016), Where are the Women Directors? Report on gender equality in the European film industry.

- **VFX studios**: The majority of participants will be European citizens, but by accepting 1-2 talented participants from outside the EU, the Training Action strengthens cultural diversity thereby stimulating the creativity and broadening the scope of the participants' networks. Global, multinational teams are generally the norm in the animation, games and VFX studios, and useful international contacts open up for potential collaborators and project funding.

- **ACE**: The European added value of the training arises in part from the diversity and the experience of the participants and speakers. As the main subject of the training is international co-production, multiple outputs from the highest possible number of countries through experienced qualified professionals is at the core of the training content and of the network.

- The **Ex Oriente Film** workshop retains a focus on Central and East Europe as a whole. The philosophy of the workshop promotes international orientation, with a focus on: Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia. Overall, the main interest of the project promoter (Institute of Documentary Film) lies with those countries, as well as Bosnia & Herzegovina, Macedonia, Ukraine, Serbia and the former Soviet states. Two projects per edition from Western Europe are also accepted in order to increase the level of cooperation between producers from different parts of Europe with different production capacities and potential.

- **Feature Expanded** has a strong European cultural identity thanks to the wide number of audiovisual professionals from different countries that will be involved in every stage of the Training Action […]. Players from countries with long traditions of experimental artists' moving images, such as the UK but also Germany and France, will be confronted with the new visions coming from east and north European nations. Experts, tutors, decision-makers and participants will share and exchange their own identities, backgrounds and knowledge related to artists' films. Becoming part of this network will facilitate and stimulate collaboration and transnational mobility among the participants.

- **Cartoon Masters** is open to participants from large and small, Western and Eastern Member States. Since no training for animation film producers exists in Eastern Europe, the training meets a specific need. Without Cartoon Masters, many animation film producers may struggle to meet with broadcasters and other professionals who can help them realise their projects and make them a success.

Interviewees also emphasise the benefits of prioritising diversity within the training, in particular the unique position of the MEDIA training to take an international view and allow participants to train with and network with peers from other countries and (audiovisual) cultural backgrounds. This is clearly seen as a key aspect of the (European) added value of the programme and which cannot be replicated at national level.

In terms of diversity aspects that may need some additional attention and support from EACEA and DG CONNECT, we can bring out two points.

First, the EAVE programme, which is one of the five international MEDIA training projects, points out that although a transnational approach brings a number of important advantages (networking effects, exchange of best practices, expanded markets, reaching other audiences, and increased financial possibilities), one drawback is the "growing

difficulty of complying with diverse European regulations on funding and reconciling this with different legal frameworks and administrative procedures outside Europe".[83]

Second, in comparison with national networks, international partnerships take time to grow organically and it is important to find out the needs of each partner to make the partnership mutually beneficial, going beyond financial benefits. Training projects which incorporate international collaborations may need additional time and support to be successful in this regard.

4.8.3 Gender

Overall, the data collection for this study has not raised any immediate issues or concerns regarding MEDIA training and gender representation. Our interviews have covered gender balance from a broad industry perspective as well as gender balance within the MEDIA Sub-programme. Although stakeholders generally recognise that there are challenges in the industry in general, there does not appear to be any noticeable concerns about the Training Actions.

Moreover, the gender composition of our participant survey was quite balanced, with 50% (309 respondents) being male and 48% (298) female, while 2% (11) preferred not to disclose their gender. This could be taken as a rather positive indicator considering the high number of responses received.

In terms of the project data, the work programmes of the Training Actions do not address gender aspects to the same degree as they address diversity 'in general'. Having said this, a number of training providers clearly state that they have gender balance as a priority:

- MEDIA Salles, which is the training provider of **DigiTraining Plus**, has run surveys in 2015 and 2016 that specifically gauge women's participation in the training. These suggest that female participation in the project is higher than "the average presence of women in sectors of cinemas such as production", with 41% of DigiTraining Plus participants being women.[84]

- The European Women's Audiovisual network (EWA), mentioned above, is also a MEDIA training provider, and runs the **Multiple Revenue Stream Training** for future films. This aims to equip European audiovisual professionals with the technical skills to reach a wide international audience in the context of digital convergence. EWA states that "it is vital that European film-makers, female and male, are able to employ internationally competitive smart uses of digital technology to ensure that their voices continue to be heard".[85]

To conclude, it is clear that overall the 58 Training Actions are concerned with ensuring that the training is accessible and useful for all participants, both in terms of the themes and topics covered as well as through ensuring tutors are relevant for all participants. However, it is more difficult to quantify the diversity of participation both in terms of the 2014 Training Actions, but equally in the longer-term, as there is no comprehensive data of participant profiles. Although this is not necessarily a shortcoming of the Training Actions, should EACEA and DG CNECT wish to undertake any analyses with regards to

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[83] EAVE project documentation.
[84] DigiTraining Plus project documentation.
[85] Multiple Revenue Stream Training project documentation.

participant profiles (and the outcomes of training per participant profile), then such data would need to be requested from the beneficiaries and training providers.

4.9   Outputs and results

The project data provide information on the skills expected to be developed at the ex-ante or implementation stages of the activities. To supplement the data produced by the training providers before/during the training, we also present findings from the survey of participants (collected ex post) and from our interview programme.

Turning first to the available data on the expected outputs and results, our review indicates that the Training Actions have predominantly been concerned with supporting craft-specific skills (e.g. script development) along with entrepreneurial skills with the view of strengthening the audiovisual sector(s) in the Creative Europe countries. Yet – as illustrates – many of the Training Actions have aimed at developing multiple skills sets among their participants.

Figure 4.15 Addressing the needs of the audiovisual sector

How is the project relevant to the needs of the audiovisual sector?
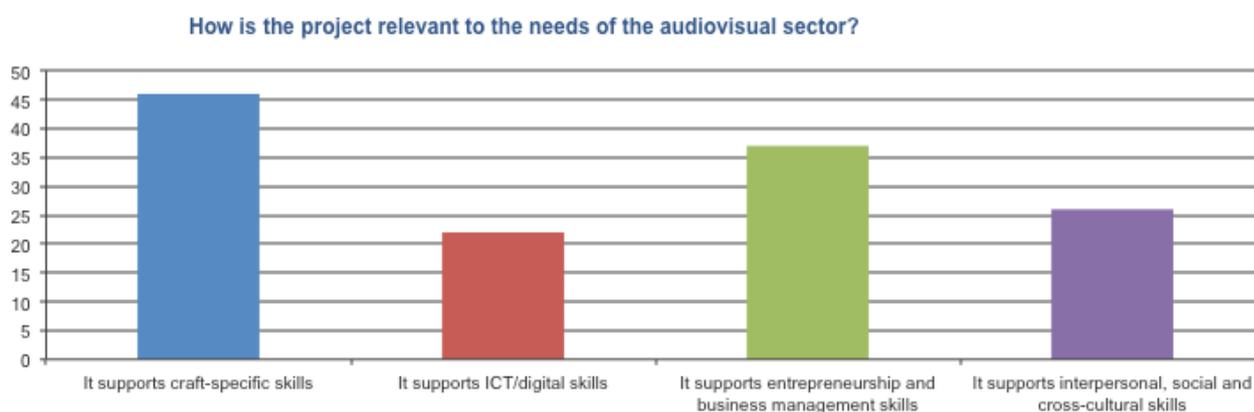
Source: MEDIA Project data

Incidentally, this approach is aligned with the EU-level recommendation from the European Skills Council for employment and training in the Audiovisual and Live Performance sectors report: "*In addition to developing digital skills across economic sectors the specific contribution of the creative and cultural sectors to the digital environment has to be recognised. All relevant EU funding programmes (Creative Europe, Erasmus+ Horizon 2020 etc.) should recognise and support the needs of skills development in the audiovisual and live performance sectors including but also going beyond basic ICT skills.*"[86]

Typically, the project promoters explain the focus of developing certain skills set with the specific needs of the industry. For example, ZagrebDox Pro aim to strengthen the skills of documentary film-makers and producers so as to address challenges facing the industry internationally. According to the project documentation:

> "*Documentary film-makers and producers are facing the global change in media in more than one way. They are challenged to take their stories to a new media*

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[86] European Skills Council for employment and training in the Audiovisual and Live Performance sectors (2016), Trends and skills in the European audiovisual and live performance sectors.

level, turning to cross media and inter-media storytelling. They are faced with a changing and diverse world of legal aspects of privacy protection and rights clearance. They are compelled to tailor make complex budgeting schemes for each project, as no single source finances the complete production for their ideas any longer. More than one source of financing may mean an increase in the complexity of a producer's work, yet it may also mean a higher financial investment can be put into a film and better results can be reached. It has never been so important for a director and producer to work inseparably together. ZagrebDox Pro focuses on the documentary film sector and offers individual professionals sets of skills regarding the above-mentioned issues, a place of discussion, opens topics that are a daily concern but not necessarily in a daily agenda, and offer extensive promotion of the projects included in the workshop. ZagrebDox Pro raises questions endeavours to raise questions not talked about enough and is not afraid to challenge set patterns of thinking and doing, where there is room for improvement and novelty. Finally, ZagrebDox Pro is an accessible meeting point for members of the documentary community from the immediate region with the members of the documentary community from other parts of Europe and the world."

In terms of the creative and commercial skills developed through the training, our review has analysed the project data and drawn out the specific skills taught through the training (presented in Figure 4.16 below).

Figure 4.16 Skills developed
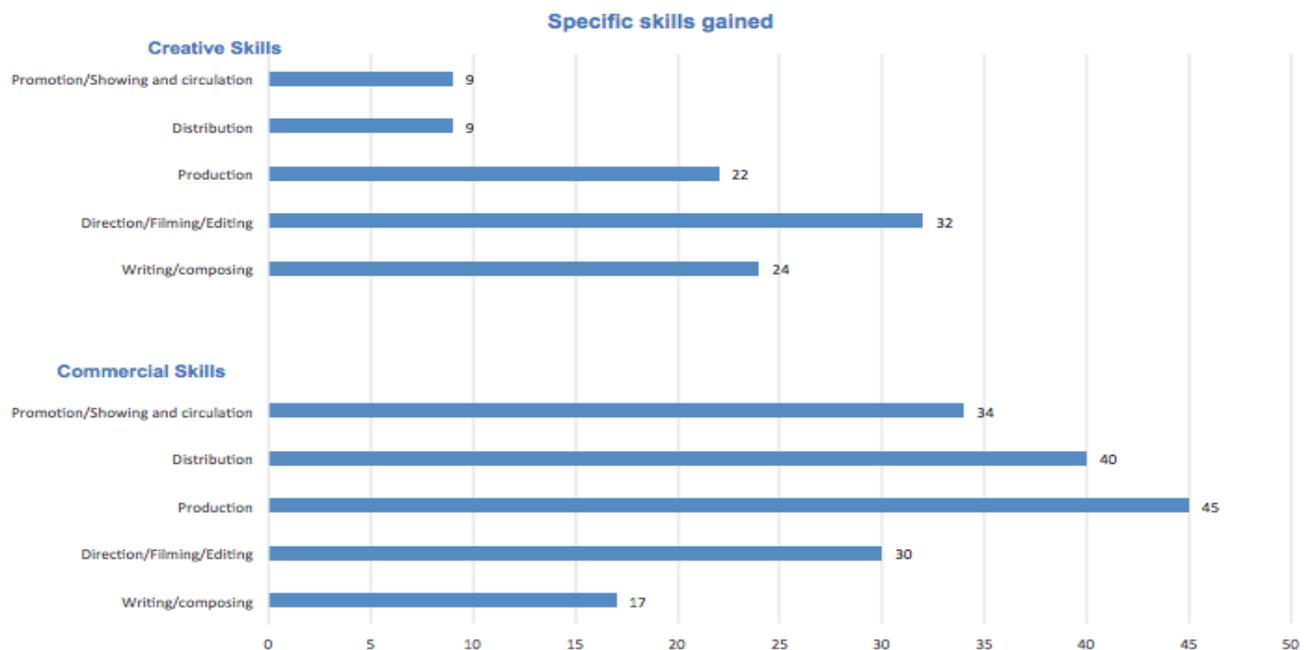
Source: MEDIA Project data

Figure 4.16 should be seen as an overview, as project data was not always explicit in identifying in detail which skills have been the subject of the training. Nevertheless, our review indicates that overall the training activities have tend to focus slightly more on commercial skills compared to creative ones. However, what is not visible in Figure 4.16 is the extensive emphasis put on developing soft skills, in particular networking and pitching skills, which have been a central part of many Training Actions.

Generally, the training activities have focused on developing professional skills not linked to specific qualifications. This is likely to be a result of the training activities focusing on skills not necessarily measured in terms of particular qualifications (e.g. script-writing development, animation, pitching, finance or entrepreneurial skills).

Only one of the 58 Training Actions results in a recognised qualification, namely UP.Grade. Co-ordinated by Deutsche Film- und Fernsehenakademie Berlin, UP.Grade is a 9-month full-time postgraduate programme, in which cinematographers, young graders with professional experience as well as young professionals from this sub-sector receive technical, aesthetic and film history training in order to be able to participate as equal partners in the production processes involved in image creation.

The figure below shows how respondents assess the **effectiveness** of the training they participated in in relation to the various **subjects** covered.

Figure 4.17 Effectiveness of training by subject

25. How effective was the training related to the following subjects?

Sub-questions	Resp.	% of responses				avg
Project development	500	17	74		9	2.81
Feature	500	12	47		39	2.76
Documentary	500	3	7	38	52	2.74
Production	500	21	55		24	2.71
Co-production	500	19	55		24	2.71
Management & financing	500	3	22	43	32	2.59
Company development	500	4	15	36	45	2.59
Audience development, marketing, distribution & exhibition	500		23	42	33	2.59
Digital & multimedia	500	3	17	28	52	2.52
Television series	500	4	13	23	61	2.49
Post-production	500	4	11	18	67	2.44
Animation	500	5	8	19	68	2.43

Average: 2.64 — Median: 3 — Standard Deviation: 0.56

- 1. Ineffective
- 2. Fairly effective
- 3. Very effective
- – N/A

Source: Participant survey (n=500)

Training is perceived to be most effective relating to the areas of project development, (co-)production, features, and management and financing. Animation (5%), TV series, company development and post-production (4% each) are the only subjects where a noteworthy number of participants regarded the relevant training as ineffective.

Although our interviews with training providers have shown consistently high efforts from organisers in securing high quality tutors, a smaller number of interviewees also volunteered feedback on challenges in securing tutors with: i) a sound understanding of European countries with emerging markets; and ii) expertise in transmedia, digitisation

and other fast-emerging fields. This may be one explanation to the response pattern for effectiveness of training by subject.

The figure below provides a breakdown with regard to the effects on the **skills** of participants.

Figure 4.18 Effectiveness in relation to participants' skills

27. **How effective has the training been with respect to the your skills in the following areas?**

Sub-questions	Resp.	% of responses		
Other, please specify	262		16	81
Craft-specific	500	12	55	32
Interpersonal, social and cross-cultural skills	500	17	52	30
Entrepreneurship / business management	500	3	17	37	43
ICT/digital	500		15	16	67

Average: 2.68 — Median: 3 — Standard Deviation: 0.53

- 1. Ineffective
- 2. Fairly effective
- 3. Very effective
- - N/A

Source: Participant survey (n=500)

As the figure shows, participants particularly view the training as effective in relation to their craft-specific and interpersonal, social and cross-cultural skills. The training seems to be less effective with regard to ICT and digital skills, although this could also be due to participants already assessing their skills in this regard to be quite advanced. Other benefits mentioned by respondents are:

- Gaining knowledge from peers and senior professionals (88% regard training as very effective in this regard);

- Learning and acquisition of skills (70% regarded as very effective);

- Better access to international professional markets (65% regarded as very effective); and

- Strengthened international business and cooperation (56% regarded as very effective).

There is less of a consensus as regards to effectiveness of training in developing better business models, with 40% regarding the training as very effective in this regard, another 26% as fairly effective, but also 4% as ineffective. One possible explanation to this mixed response may be the broader (structural) difficulties in securing finance in the post-2008 environment, something which could prove difficult to effectively teach over a short period of time.

Among wider stakeholders there is a broad consensus that there is a need to improve business skills of audiovisual professionals. More generally, several interviewees have pointed out the lack of mutual understanding between the financial sector and audiovisual sector.

The participants also stress the value of the networks they gain access to thanks to training participation, with some participants now collaborating on projects. Only a few participants blame a lack of time for diminishing the effectiveness of the training they participated in.

Overall, 83% out of 486 respondents are very satisfied with the training in which they participated, and another 15% are satisfied. Only 1% are dissatisfied, and a further 1% state it is too early to say. Similarly, 86% of 484 respondents to this question rated the Training Action(s) they participated in as overall very effective, another 12% fairly effective, and only 1% ineffective (1% not applicable). Some of the reasons given include the possibility to directly apply the lessons learned to one's own work, the boost it gives to participants' careers, the valuable networks built, the resources put into the training, professionals' successes such as films completed that can be directly traced back to participation in training, the enjoyable experience, and the new perspectives participants are introduced to. Only a very few respondents expressed dissatisfaction with the training they participated in. Survey respondents were also asked to rate the Training Actions' effectiveness with regard to the following wider benefits:

Figure 4.19 Effectiveness of Training Actions in relation to wider benefits
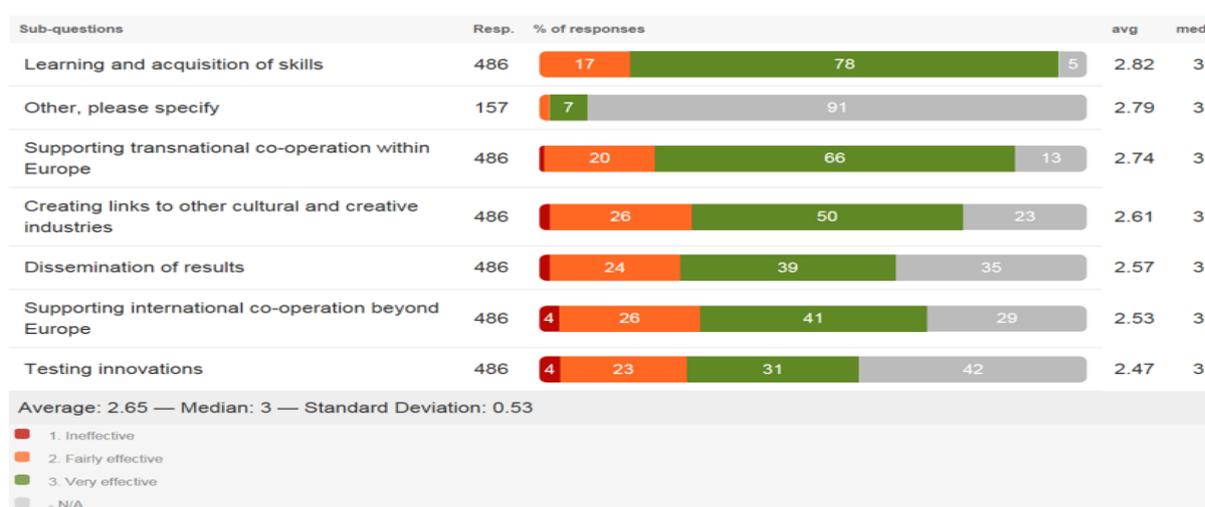
Source: Participant survey (n=486)

Unsurprisingly, participants particularly emphasise effectiveness in relation to the learning and acquisition of skills. But they also acknowledge the benefits in terms of supporting transnational co-operation within Europe, and in creating links to other cultural and creative industries. To a lesser extent, benefits are also recognised with regard to dissemination of results and supporting transnational co-operation beyond Europe, with some respondents referring to concrete examples of international projects they launched after participating in a Training Action. The 'testing innovations' category is another wider benefit. In commenting on this question, some respondents appreciate the efforts undertaken by training providers in keeping the networks created during the training alive in an alumni format.

4.10 Costs of participation

The cost of training can be borne by the organiser(s), by the participants or through a co-funding model that is partly subsidised and partly paid for by the trainees. Who pays for the training is partly decided by whose needs the training fulfils, e.g. individual, employer, wider society needs or a combination of these.

Public spending on training can accommodate socioeconomic needs and support knowledge-intensive industries. On the other hand, training that is paid for by the public purse may inadvertently lower the motivation of the trainee – there is no incentive to get value for any money paid. Governments can also create incentives for providers or learners. However, if incentives are overgenerous, they risk reducing local initiatives which may reflect local needs of learners, firms and industries. It can also take time before local needs are articulated at a national level, hence there is a time lag before training can be developed, funded and put in place. This makes it challenges to design training using a top-down approach.

The MEDIA Training Actions have different fee structures but generally follow a co-funding model approach. As stated previously, all training providers need to co-fund their actions but receive a partial grant from the EU.

As part of our project review we have also looked at the costs to the participants – i.e. the fees charged to professionals for participating – for each of the 58 Training Actions. As shown in Table 4.4, our analysis of the costs of participation shows that over half of the projects (52%) have provided training for €1,000 or less.

Table 4.4 Costs of participating in Training Actions

Cost per participant	Percentage of Training Actions
€ 0-250	24%
€ 251-500	6%
€ 501-1,000	22%
€ 1,001-2,000	16%
€ 2,001-4,000	13%
€ 4,001-5,000	13%
€ 5,001-7,500	6%
> € 7,501	2%

Source: MEDIA Project data

However, these costs do not include other expenses, notably travel, accommodation and subsistence costs, which may be added to the participation fee. Although most projects offer scholarships to a limited number of participants, it is difficult to gauge overall affordability of MEDIA-funded training. A main reason for this is the varying lengths and content of training (e.g. comparing the cost of attending a postgraduate course with that of an e-learning training course). Therefore, it is important to proceed with caution in this regard. However, in an attempt to shed some light on costs we have selected at random 10 of the Training Actions to examine their costs to participants and scholarships available.

Table 4.5 Costs of participation in selected Training Actions

Training Action	Total costs for each participant	Percentage of participants for whom scholarships available (foreseen)	Total number of participants
Interactive Factual Lab	€ 830	10%	32
EP2C	€ 900	5% of European participants – full grant 55% – partial grant	22 (Year 1)
DigiTraining Plus	€ 320	6 (23%)	26
EURODOC	€ 2,800	60-70%	78
CPH: Lab	0	n/a	20
EQUINOXE EUROPE E.V.	0	16% (travel and accommodation)	17
Mediterranean Film Institute	€ 1,500	20%	50
Torino Film Lab	€ 2,000	21% (of which 3 full scholarships)	14
Screen4All	€ 900	5 (20%)	25
Up.Grade	€ 4,500	3 scholarships, with a special priority given to low capacity countries	10

Source: EACEA interim and final report data

EACEA's guidance states that "*scholarships should correspond to at least 15% of the total number of participants and cover at least the tuition fees. It is recommended that they also cover expenses for travel and subsistence*." It would appear that the approach to awarding scholarships is quite varied both in terms of criteria as well as volume. Our survey of participants found that 40% out of 509 survey respondents received a scholarship to participate in a Training Action. This is very high number which is highly likely skewed and is not representative of the MEDIA Training Actions overall.[87]

The anecdotal evidence from the telephone survey of training providers (undertaken with just under half of the 58 Training Actions) also suggest that steps are continuously taken to keep training as cost-effective and as 'open' as possible to ensure a level playing-field across large and small countries:

• Training takes place partly online and/or in central/cost-effective locations which allow for cheaper travel;

• Special arrangements are made with tutors (they are secured at a lower price than the market rate);

• Training fees may be discounted; and

• Training sessions are hosted in low capacity countries to: i) make links with local industry; and ii) encourage participation. Training programmes may also circulate across different European countries to allow participants from different countries to participate (e.g. lower travel costs for audiovisual participants nearby).

[87] The very high number of scholarship beneficiaries may be the result of e.g. the survey question on scholarships being misunderstood to also encompass other sources (e.g. national) of scholarships. Alternatively, it may be that participants who received a scholarship from the training organiser were more likely to respond to the survey.

5.0   PEDAGOGICAL ANALYSIS

5.1   Introduction

The previous section has considered the characteristics, objectives, geographical balance, activities, profile of participants, outputs and results of Training Actions. Building on that analysis, we now explore *how* the inputs of funding into the Training Actions have generated effects. Analysing the teaching methods and potential for dissemination is important as a means of understanding how impact can be maximised. It is also important as a means of understanding how European added value is generated; actions supported by MEDIA should be additional to those supported by Member States and should have a genuine European dimension. Finally, the analysis of teaching methods offers the potential to highlight good practice and ways to improve training provision in future, whether funded by MEDIA or not.

This section thus offers a "pedagogical" analysis of teaching, opportunities for dissemination, room for improvement, bridges and cross-over, and adoption of best practice. It offers a *qualitative* assessment of:

- **Course design**, including selection of content and recruitment of participants;
- **Course delivery**, including teaching, networking and follow-up of participants; and
- **Dissemination** of results and cross-overs to other sectors.

Our intention in this section is identify the factors that are common to many/most Training Actions, as well as to highlight the diversity within Training Actions. For that reason, the analysis presented here is largely qualitative and based on the review of project documents, interviews and case studies, although we refer to quantitative data where relevant.

5.2   Course design and recruitment

The guidelines for Training Actions allow a degree of freedom for training providers in respect of the content and design of their projects, as well as in the methods that they use to attract participants. As intended, this has resulted in a diversity of approaches. Within the selected Training Actions, we can highlight some common features, as well as some interesting features in respect of course design.

The objectives, focus and content of Training Actions is generally determined by professionals operating in the industry – typically at a high level. Whilst the training providers initiate and co-ordinate Training Actions, they rely heavily on inputs from active professionals to determine the overall focus and the content, rather than only on full-time teaching/academic staff. Indeed, programme leaders and others contributing to Training Actions are very often professionals involved in the process of creation, production, distribution, etc. and who take time out to support Training Actions. The approach taken varies between Actions but such professionals include consultants working in the field (e.g. ANIDOX:LAB), pioneers in technical innovations (Berlinale), film directors (Ekran), producers (Inside Pictures). For example, programme leaders within the Ekran project are both directors and experienced teachers from European film schools, who can thus link theory with current practice in the industry.

Participants in Training Actions are typically attracted via word-of mouth or professional networks. Training Actions use multiple media to attract participants in the training, including websites and attending festivals. Some have received support from the Creative Europe Desks in promoting their training courses to professionals and some Desks have received enquiries from professionals whom they then signpost to the Training Actions. However, the most effective method tends to be word-of-mouth and/or professional networks. For example, the Crossing Borders project makes good use of professionals operating "on the ground" to attract suitable participants. Similarly, the Midpoint project has made use of "scouts" (professionals in other countries receiving a small fee) and local film promotion agencies to identify participants. The MAIA project has set up a network of ambassadors at the Cannes film festival. In particular, the successful Training Actions become known in the industry through the profile and reputation of previous participants and through the concrete results that often emerge from them. For example, the Ex-Oriente Film Programme publicised its training via multiple channels but found that word-of-mouth was consistently the most effective. Where previous participants in Training Actions or productions emerging from Training Actions are nominated for industry awards, this creates positive publicity for Training Actions and thus a demand for places. For example, participants in ACE had gone on to be nominated for US Academy awards, which helped raise the profile of the Training Action.

Training Actions tend to carefully select participants and focus on providing in-depth support to a small cohort of professionals, rather than serving large numbers in each edition of the training. On the whole, the Training Actions have not struggled to attract sufficient participants to fill the training places available. For example, the Berlinale tends to receive about 5,000 applications with some people submitting repeat applications each year. Most Training Actions thus have the "luxury" of being able to select participants that they believe are most suited to the training and who are most likely to gain from it. For example, the Ekran project works with its partner organisations in different countries to attract participants that are most likely to gain. Training Actions also tend to review the expertise and experience of participants prior to participation, not only to select the "best" participants but also to enable appropriate customisation of the training. For example, the Screen Leaders project analyses each applicant company before participation in order to customise provision and also as the starting point for supporting the company in developing a strategic plan. The Inside Pictures project has also changed its approach to require participants to attend all modules both in London and Los Angeles; previously, participants could choose to attend only those in London, but this meant that some participants were less prepared, less involved and made less progress, which reduced the overall impact for all participants.

Training Actions actively seek to involve a diversity of participants. Reflecting developments in the sector, the Training Actions seek to attract professionals from different backgrounds, as such diversity makes collaborations and interactions more fruitful. This can be in terms of the sector in which the professionals operate, e.g. bringing producers of documentaries and of animations together. It can also be in terms of occupation. For example, the Cartoon project attracts content developers, animation professionals, distributors & sales agents, funders and financiers.

The content of Training Actions reflects current developments in the industry and tends to be updated each year in light of participants' needs. Whilst the overall aim and focus of many/most Training Actions stays the same from year to year, the precise content is usually updated to reflect emerging trends and the specific needs

of participants. For example, the ANIDOX:LAB project has covered new models of production and distribution, which are constantly evolving and thus requires the content of training to be kept up-to-date. One positive indication with regards to the quality of the Training Actions is that work programmes have detailed descriptions of the coordinating body's previous experience of undertaking similar training in the past and tend to include a self-assessment on how the current activities build on past experiences and how they have sought to improve on past challenges. For example, the Berlinale undertakes a significant evaluation each year, which informs the design and content of future years' training. Across many/most Training Actions, it is also the case that **participants are typically involved in determining the precise content of Training Actions**. Indeed, an iterative process is typically followed whereby participants are attracted and accepted, their needs and preferences are reviewed and then the training provision is designed appropriately.

As intended, **technology and the digital shift are integral to many/most Training Actions, but this manifests itself in different ways**. Of course, this reflects the industry itself, where technological developments and the digital shift are affecting all parts of the value chain. In some Training Actions, the technological and digital dimension relates to new uses of technology within the processes of creation, production and distribution. For example, the ANIDOX:LAB project has enabled its participants to use virtual reality headsets, as a way of encouraging them to think about how they can use such technologies within animation. Similarly, the Berlinale has used pioneers in various sectors to raise awareness of technical innovations (e.g. 180^0 screens, virtual reality) and support participants to understand how they can use such innovations. Within the Inside Pictures project, the use of digital technologies along the value chain is covered within its training programme on business training and leadership skills. The Cartoon project has helped participants to make use of new digital distribution platforms. Training Actions also make use of new digital forms of providing learning (see below).

Some Training Actions address all parts of the value chain, whilst others focus on particular parts – but a diversity of skills is usually covered. Few of the Training Actions can be neatly categorised as addressing one particular occupation or part of the value chain; this reflects the rapidly-evolving nature of the industry, where boundaries between different roles become blurred, more professionals have to be multi-skilled and collaborative working becomes ever more important. Where Training Actions serve one part of the value chain, they usually facilitate the acquisition of multiple skills, for example, craft-specific skills as well as leadership skills. In other projects, a deliberate choice has been made to bring together professionals working at different parts of the value chain, e.g. the Screen Leaders project.

Training Actions draw on expertise from across the EU and beyond. In addition to tutors from the EU Member States and other Creative Europe countries, experts from almost 30 other countries have been involved in delivering training, including Australia, Bosnia & Herzegovina, Brazil, Canada, Chile, China, India, Indonesia, Iran, Israel, Japan, Jordan, Kenya, Korea, Macedonia, Malaysia, Mexico, Peru, Qatar, Russia, Singapore, Switzerland, Taiwan, Tunisia, Uruguay and the USA.

## 5.3   Course delivery and follow-up

The guidelines for Training Actions require training providers to demonstrate that their projects will offer high quality training provision that is relevant to the changing needs and trends of the industry. Training Actions should also be innovative in relation to the

existing European training offer. To address these requirements, Training Actions have adopted a diversity of approaches to course delivery and follow-up. From these, we can highlight some common features, as well as some interesting examples.

Innovations within the delivery of Training Actions tend to consist of the package of support offered or in the focus of training, rather than in terms of teaching methods. Few, if any, of the Training Actions reported that they had specifically tested new pedagogies or innovative forms of delivering training. Instead, the innovations feature in other ways. In some cases, the innovation relates to the content of training, which is updated each year in light of evolving industry needs. In other cases, it is the mix of participants – from different parts of the value chain, different occupations, different sectors or different countries – that is innovative and also how those participants are exposed to wider professional networks. A key part of the Training Actions is also about supporting professionals to think and act more innovatively, for example, in terms of developing new models of production and distribution or in accessing new sources of finance. Other projects have supported the development of audiovisual productions that are cross-overs and hybrids. For example, the ANIDOX:LAB project has focussed on stimulating innovative new approaches to the use of animation as a medium for the production of documentaries.

Training is provided by different formats but face-to-face and residential provision remains central. According to the project data (application forms), MEDIA recognises four 'formats of delivery' for Training Actions, namely '*Residential'*, '*Online sessions / consulting'*, '*Tutoring/follow up'*, and '*Networking'*. Of these, the most highly valued and most commonly used method of teaching was residential – i.e. face-to-face – teaching, which offers more scope for discussion and interaction between tutors and participants. Approximately 94% of all Training Actions made use of residential teaching. As can be viewed in Figure 5.1, in combination with the residential mode of delivery, most Training Actions also strongly value networking as a mode of delivery (used by 80% of Actions). By the term 'networking', we mean training which entails structured/planned interaction with other professionals to exchange information and develop knowledge and contacts. Indeed, for the most part, the training activities were delivered through a combination of modes or methods. Typically, training has involved a number of days of residential activities (i.e. classroom-based training of seminars), which then were followed up through networking events specially designed for the training, online sessions (60%) and/or one-to-one tutorials (66%).

Figure 5.1 Methods/modes of delivery of the Training Actions
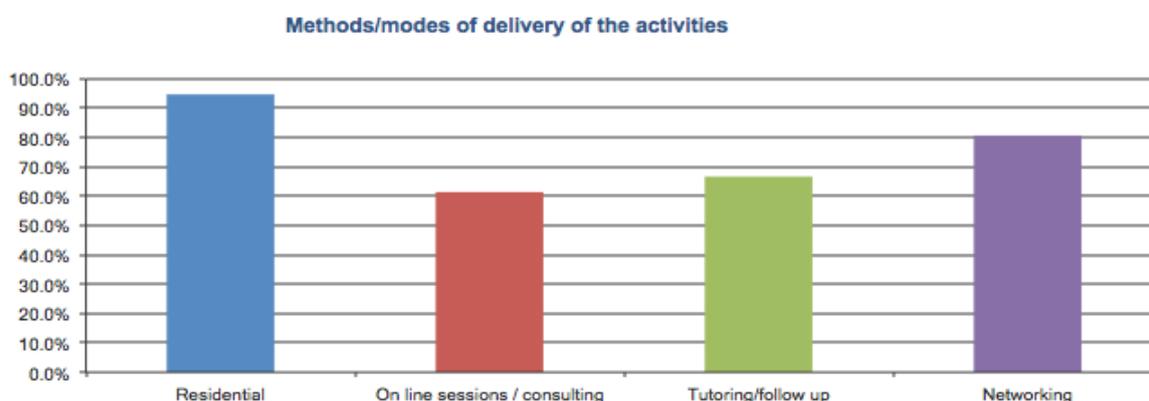
Source: MEDIA Project data

Electronic and online learning is widely used, but usually as a complement or follow-up to face-to-face and residential learning. As shown by the figure above, online support features in 60% of Training Actions. This has taken different forms. For example, the Cartoon project has featured video interviews and presentations made available online for participants to access. However, online learning did not feature as the main form of provision in any of the Training Actions that were interviewed. The main reason for this is that the learning is generally intended to be highly individual, personalised and relational (as we discuss below), which is hard to achieve via online and remote formats. Instead, online learning tends to be a means for participants to make progress in between the residential sessions, for follow-up with participants or to assist networking with a wider set of professionals. For example, the Berlinale project features an online community of 6,000 professionals, a filmography and a project database, which participants can use to make new contacts and increase their profile.

Within the four main formats (residential, online, tutoring, networking), **there is considerable diversity in the specific type of training offered**. The figure shows which the types cited by survey respondents in descending order of frequency. As the figure below shows, residential workshops (usually running over 2-5 days) are the most frequently mentioned type of training. Group sessions and one-to-one meetings seem to be of equal importance, with lectures and case studies being slightly less common. Remote training forms such as online consulting (17%) or online training (6%) are of relatively minor importance. Generally, interactive sessions such as workshops, group sessions and consulting appear to be more frequent than one-way training formats such as case studies, screenings, or lectures. This corroborates interview feedback according to which face-to-face interaction is key in delivering successful training.

Figure 5.2 Types of training within Training Actions
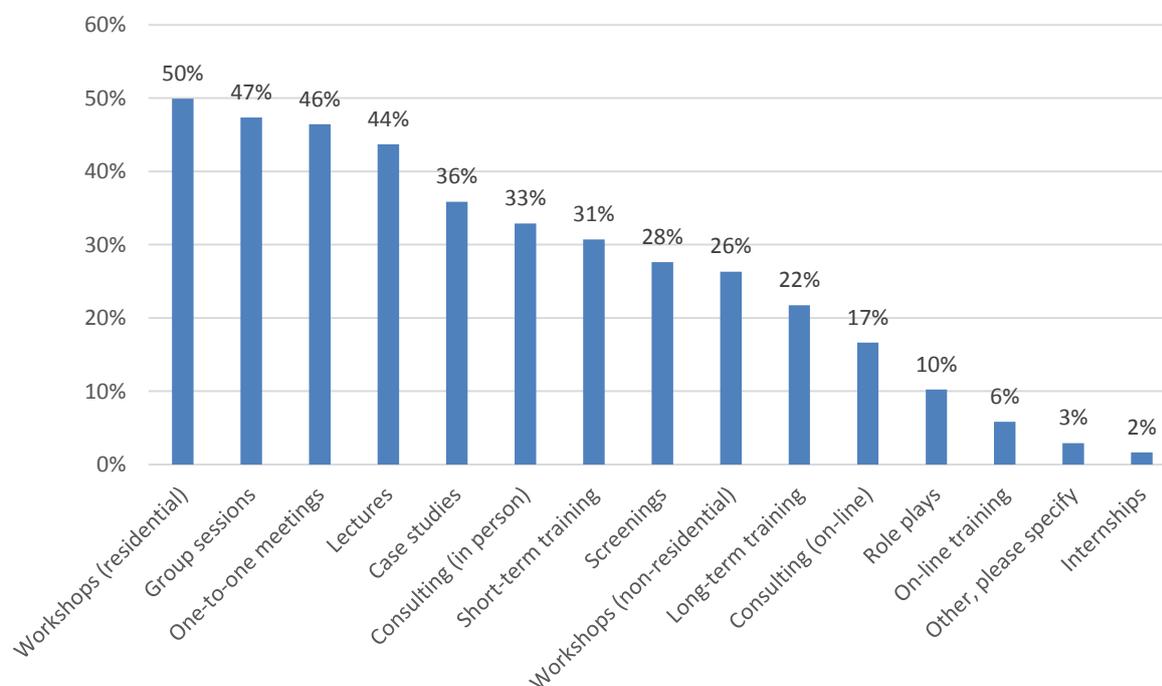
Source: Participant survey (n=547; more than one answer possible)

Learning has been highly individualised and personalised. As noted above, the Training Actions typically aim to provide in-depth support to a small, hand-picked cohort of trainees. Part of this approach involves the provision of support from experienced fellow professionals and in relation to specific opportunities and challenges facing the participants. A common approach is for professionals operating in the industry to provide tutorials or lectures, which are then followed by one-to-one mentoring sessions within individual participants. For example, participants in the Ekran project have received tuition from (currently active) film directors, as well as one-on-one coaching, usually relating to a specific project of the participant. Similarly, the ANIDOX:LAB project make use of lectures and case studies (around 15-20% of course content), which are then followed by individual and peer-to-peer feedback sessions. Within the Inside Pictures project, participants have been together to work on practical tasks, whilst also receiving one-on-one "surgeries" at two points during the period.

Learning provision is often project-based. The intention of many/most Training Actions has been not only to facilitate the acquisition of skills but to enable participants to progress their careers in a very practical tangible way by developing projects. Participants might develop existing projects or be supported to develop new ones. For example, project development is at the heart of the approach taken by the ESoDoc project. The project features "hatch labs" in which participants take turns to present their projects to their peers and receive advice and feedback. Participants also receive support with their projects from tutors. The intention is that at the end of the training, the participants will be able to take home a project that is further developed and thus more likely to be successful. Within the Dok Incubator project, the project-based approach means that an entire project team is involved in training.

Training Actions are very often focussed on delivering tangible end-products and concrete outcomes, as well as the acquisition of skills. This has taken different forms, depending on the focus and content of each Training Action. In some cases, the development of such concrete outcomes has formed the main focus of training activities. Two examples include Inside Pictures and Sources 2.

- **Inside Pictures**: during the course of the Training Action, participants are paired together to work on a film project of their choosing, in some cases an existing project idea. At the end of the training, the participants are required to present a creative and financial pitch for a real or fictional film project to a panel of senior film industry executives. Over the course of the year, participants receive two sets of one-to-one 'surgeries' about their project, covering all aspects of delivery. For many participants, the project work is an opportunity to develop a real project, which is then produced.

- **Sources 2 Projects & Process** addresses the tendency for many scripts to be used in productions before they are developed to their best potential. Through a process that is project-specific, Sources 2 training activities focus on contemporary script and story development for the big and small screen. The training leads participants through understanding processes of development, whilst high-level experts engage participants not only in the writing process but also in innovation, production and distribution. Sources 2 workshops enhance film professionals' know-how in the field of storytelling and script development, stimulating their creative and artistic skills, their interpersonal and social skills as well extending their international and business networks. The Script Development Workshops (long-term training) are project-based and focus on story and script development of feature-length film and creative documentary projects for the screen (web, cross/trans-media, cinema and television).

Participants bring a script that is at an early stage of development and are supported through a collaborative process to develop the script, the intention being that they are able to complete a better developed and higher quality version by the end of the training.

In other cases, the practical and project-based approach of Training Actions leads to concrete outcomes as an indirect effect. For example, some film-makers participating within the ESoDoc project have produced films using new formats that they were exposed to through their participation in the project. Others film-makers have enjoyed (international) breakthroughs with new project developed with the help of ESoDoc or have started new co-operations or new businesses. For the MAIA project, the focus has been on supporting young producers in the creative process but also in the process of setting up production companies, accessing finance, addressing legal issues and marketing and distributing their productions; the project promoter reports that several new companies and co-productions have resulted.

Follow-up is integral to the ethos and the activities of Training Actions. The Training Actions generally focus on developing the careers of professionals – enabling them to gain skills, widen their professional networks and access new markets. This is usually seen as a process, whereby professionals are supported to move forward, rather than a one-off intervention. Most or all of the Training Actions thus offer some form of follow-up activity, both between residential training sessions and after the end of the course. The most common form of support between training sessions is mentoring and "surgeries" provided by experienced professionals or tutors. Once a project finishes, support takes a variety of forms. Very often, a final mentoring or consultation will take place. For example, the Screen Leaders project provides a post-training review to evaluate the state of the participating companies, what they have learned, the impact of the training and how Screen Leaders can assist them in the future. Screen Leaders also helps the participants to develop a post-training plan. Most Training Actions also maintain contact with previous participants through one means or another, although this tends not to be through active, formalised alumni networks. The DOK Incubator project monitors the progress and future successes of all participants in each cohort, as a means of knowing which elements of the provision might have been most successful. Similarly, the EAVE project has operated a survey to systematically track the effects of the EAVE Producers Workshop on individual carers, companies, projects and the wider sector. A very common follow-up activity is for projects to organise networking events for current and/or former participants at key festivals, as did the Inside Pictures project at Cannes and Berlin. Another common activity is to maintain an online forum/community of previous participants, which the Inside Pictures project has also done.

5.4   Dissemination and cross-overs to other sectors

The European Commission and EACEA undertake a range of activities to promote the Creative Europe Programme and to disseminate its results.[88] In addition, the MEDIA Training Actions are required to disseminate good practice and project results, so that they can have a wider impact on the sector. The project data generally contain rich information on the dissemination strategies which follow the training activities or, in some cases, are implemented in tandem. As shown in the figure below, the Training Actions make widespread use of websites and social media tools to present results and also prioritise dissemination through festivals and other types of events, including

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[88] See: https://ec.europa.eu/programmes/creative-europe/

networking events with industry. Training Actions also collaborate with the Creative Europe Desks and industry associations, for example. However, information about the availability of and results of training is not consistently made available to the Creative Europe Desks.

Figure 5.3 Dissemination of results
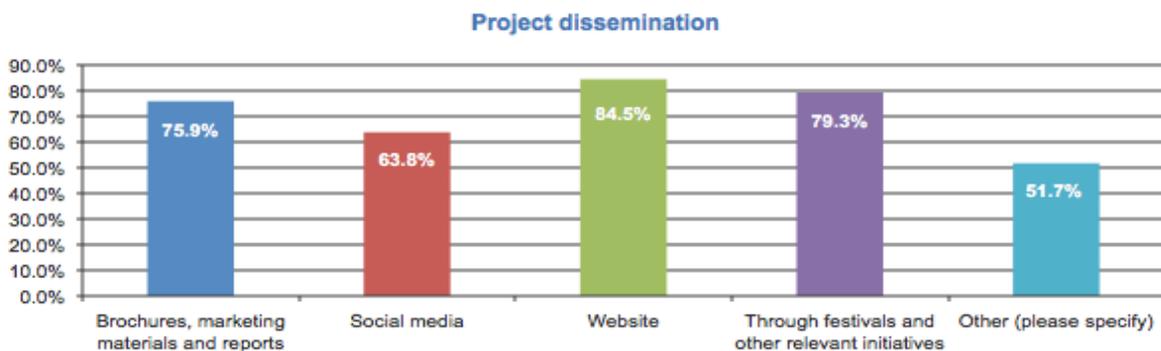
Source: MEDIA Project data

With regard to the effectiveness of dissemination activities, 51% out of 477 participants regard them as very visible, and 40% as fairly visible. Only 2% see them to be not visible, and 6% were not sure. This generally suggests a good visibility for the Actions in the sector, to the extent that survey respondents have a relevant overview through their professional networks. The interviews of stakeholders also suggest that visibility of the Training Actions more broadly is relatively good. Although we cannot quantify visibility, all interviewees from the wider audiovisual community were aware of the Creative Europe Programme, although most of the interviewees were not actively involved.

The Commission's application guidelines for Training Actions strongly encourage **partnerships with festivals or co-production markets** within Europe or internationally. In any case, this is one of the main ways by which professionals in the industry seek to expand their contacts or raise the profile of their work. Most, if not all, Training Actions thus feature such activities to a greater or lesser extent. In some cases, the training sessions themselves are scheduled to take place alongside key festivals, thus facilitating the participation of professionals (who might have attended the festivals anyway) and creating opportunities for dissemination.

For example, Documentary Campus and the European Documentary Network are promoting the projects participating in Crossing Borders at over 55 international markets and festivals. Documentary Campus Industry Events organised in collaboration with Sheffield Doc/Fest (UK) and DOK Leipzig (Germany) often feature talks about the Crossing Borders programme and the experience and knowledge the project has gathered in Asia. In this way, Crossing Borders is able to share this expertise with large numbers of festival delegates from around the world. For example, the Sheffield event is usually attended by over 2,000 delegates, while DOK Leipzig has approximately 1,700 delegates.

The Commission's application guidelines also encourage projects to include **pitching sessions**, whereby participants present their project, products or proposals to industry decision-makers, as well as activities to **distribute audiovisual works** developed

during the course of Training Actions. Pitching sessions and other dissemination activities provide useful experience and, in some cases, offer the potential for proposals to be adopted for financing, co-production, etc. For example:

- **ANIDOX:LAB**: pitching sessions were considered to be the most efficient tool to disseminate project results and ensure impact and sustainability. The project enables participants to present at up to ten different festivals or conferences each year to present their programme, sometime even featuring a specific ANIDOX:LAB project for participants to pitch their projects.

- **Cartoon**: five of the projects that were pitched within the Training Action are now being developed with production companies, i.e. one quarter of the participants.

- **ENTER** combines pitching sessions with key festivals.[89] The project helps lenders, investors, and financiers to deepen their understanding of lending opportunities and financing needs of the creative industries, as well as how to mitigate risks associated with such lending. It enables such participants to attend two key industry and financing events, namely the International Games Week Berlin and the Production Finance Market in London. At these events, the participants take part in pitching and networking sessions, roundtables and panel discussions with games and film professionals. They also benefit from personal discussions with the project's coaches and experts.

- **Ex Oriente Film**: culminates in the pitching sessions of projects at the East European Forum co-production meeting, featuring the final pitching in front of Europe's and North America's leading commissioning editors and independent producers, distributors, buyers and film fund representatives.

- **EAVE**: live streamings of the workshops have been shown at festivals and market panels, one of which attracted 2,000 viewers.

- **Torino Film Lab**: the training finishes with a co-production market in November every year. This offers a concrete opportunity to present finalised projects to an international audience and to facilitate collaborations between trainees and a wider set of professionals.

- **Atelier Ludwigsburg-Paris**: features dissemination of the short films produced, as well as study visits to festivals as well as to TV stations and companies such as ARTE, EURIMAGES (Strasbourg), ARRI and Bayrischer Rundfunk (Munich), in order to reinforce the network of the participants.

Last, some Training Actions have disseminated some of the **training tools and materials** developed, including through making them available online for other professionals not participating in the Training Actions. For example, the Impact Producers Lab project recently released a new free, online Impact Toolkit – available to film-makers anywhere in the world and providing a framework for these new activities.[90] The Impact Toolkit has more than 20 online modules, which included 115 featured case studies along with tools, readings, graphics, and a set of resources. Modules cover theories of change, team building, management strategy, devising metrics and evaluation indicators, partnership models, and much more. It is designed to enable film-makers, journalists and organisations who are looking to work with film more strategically.

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[89] www.enter-training.net/eu/index.php
[90] www.impactguide.org

The box below presents a more in-depth case example of dissemination activities undertaken by a Training Action.

Case example: Screen Leaders

Screen Leaders is a strategic development programme for companies working in film, television, animation, games, post-production, VFX, facilities, sales, distribution and exhibition. It is funded by MEDIA and the Irish Film Board/Bord Scannán na hÉireann.

A new Screen Training Ireland website was launched in 2015. This has a dedicated section for the Screen Leaders programme. The Screen Leaders section contains a promotional video explaining the purpose of the course and its target audience, and interviews with previous alumni explaining the benefits to them and their company of having completed the Screen Leaders training programme.

Screen Training Ireland is actively promoting Screen Leaders both inside and outside of Europe with the aim of combining 20% of the companies from outside the EU, such as New Zealand, Australia, North America as well as increasing the mix of participating companies in the EU to include new disciplines.

Screen Training Ireland has also developed a database of companies across the EU. Companies are approached by Screen Leaders to promote the training. Companies do need to be at a critical stage of development and ready for change. They need to be open to exploring the structure and future strategic development of the company and their own roles in the company. Screen Training Ireland also meets with the Creative Europe Desks, film funds, guilds, agencies, training providers and industry practitioners to promote the programme throughout the EU. Screen Leaders are presented at industry events, including the Berlinale Film Festival, where Screen Training Ireland promoted the training and met with potential tutors and trainers for future editions. Screen Leaders also organised an alumni event at the Berlinale, Cannes and Galway Film Fleadh.

The Training Actions also offer potential for cross-overs between the audiovisual sector and other sectors as defined in Article 2 of the Creative Europe Regulation.[91] These include inter alia "architecture, archives, libraries and museums, artistic crafts, … tangible and intangible cultural heritage, design, festivals, music, literature, performing arts, publishing, radio and visual arts". Overall, such cross-overs tend not to form the main focus of the Training Actions and tended not to be given priority over other objectives, such as widening the contacts of professionals within the audiovisual sectors. Indeed, when interviewed, some Training Actions made no reference to any particular cross-overs.

One exception was the Dok Incubator project, given its involvement of whole project teams. As a result, the participants in Dok Incubator included visual artists, journalists and theatre professionals, as well as audiovisual professionals. Other instances of cross-over were also reported, relating to diversity of other sectors. The EAVE project operates a specific module "ART:FILM" to enhance and nurture artistic cinema and visual arts. The Cartoon Masters project reported that there was collaboration with video-game producers on merchandising. Midpoint operates a Training Action for scriptwriters and is a member

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[91] Regulation (EU) No 1295/2013 of the European Parliament and of the Council of 11 December 2013 establishing the Creative Europe Programme (2014 to 2020).

of the Academy of Performing Arts Academy of Performing Arts in Prague and therefore co-operates with theatre professionals, many of which go on to work in TV and film.

6.0   OVERALL IMPACT OF TRAINING ACTIONS

Having considered the activities of the Training Actions and their effects on participants in Section 4, we now consider the overall European added value (EAV) of the Training Actions. This is considered in terms of: relevance to needs in the sector, impacts on the needs of the sector, value added compared to other forms of provision and bridges and cross-overs to other sectors.

6.1   Relevance of Training Actions to needs of the audiovisual sector

The overall objective of Creative Europe is to support the audiovisual sector's capacity (taking into account the different levels of capacity found in the European countries and EU member states). The MEDIA Sub-programme contributes to this by facilitating the acquisition and improvement of skills and competences of audiovisual professionals and the development of networks. Accordingly, the priorities covered in the Training Action guidelines are:

- Digital technologies;

- Adaptation to market development;

- New approaches to audience development; and

- New business models.[92]

The guidelines list the eligible activities which relate to the following fields:

- Audience development, and development, marketing, distribution and exploitation;

- Financial and commercial management in particular with a view to stimulate access to finance;

- Works development and production; and

- Opportunities and challenges of the digital shift.

In this context, the survey results presented in section 4.5 suggest that digital technologies play less of a role as one would expect based on the programme objectives, whereas topics such as audience development, financial and commercial management, and production in particular feature prominently in the actual training provided.

Specifically in relation to the eligible activities, training providers were asked to attach a score from 1 (minimum) to 10 (maximum) **to their relevance to the skill needs of audiovisual professionals in their experience.** Generally, respondents regard all four activities as highly relevant to the skill needs. This is particularly the case for *works development and production* (average score of 10), and slightly less so for *audience development, marketing, distribution, exploitation* and *opportunities and challenges of the digital shift* (average score of 8 each).

Overall, participants responding to the survey deem the **Training Actions to be highly relevant to industry needs**, with 93% of 508 respondents considering them to be *very relevant*, and another 7% *fairly relevant*. Only one respondent considered the Training Action(s) he/she took part in to be *irrelevant*. In particular, survey respondents point out

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[92] Creative Europe. MEDIA Sub-programme. Support for training. Guidelines. p. 3f.

that the focus on project development, the possibility to network with industry contacts, and the workshops make the training relevant.

The opportunities for individual feedback, customised training and the right mix of practical skills and theoretical knowledge are praised by respondents for making the training relevant to their needs. Moreover, many respondents seem to have been greatly motivated through participating in training in pursuing their projects and with lessons learned being applicable to future projects and their career overall. In most cases, expectations were at least met, if not exceeded, with one respondent calling his training participation a "life-changing experience".

Going beyond the particular Training Actions they took part in, participants responding to the online survey were asked **how relevant the Training Actions as a whole are to the skill needs of audiovisual professionals** in Europe. Some 87% provided the answer very relevant, and 12% believe the Actions to be fairly relevant to skill needs. These results are confirmed by the telephone survey carried out with training providers according to which 13 training providers consider the Training Actions *very relevant* to the skill needs of audiovisual professionals, and another two *fairly relevant*. No training provider considers them to be irrelevant.

6.2 Impacts of the Training Actions on sector needs

The overall intention of the Training Actions is to contribute to the achievement of the objectives of the Creative Europe Programme. This sub-section therefore explores that extent to which and the ways in which the Training Actions have (collectively) made a contribution to the general and specific objectives of the programme (as presented in Table 6.1 below).

Table 6.1 Objectives of the Creative Europe Programme

Type of objective	Objective
General objectives	(a) safeguard, develop and promote European cultural and linguistic diversity and to promote Europe's cultural heritage; (b) strengthen the competitiveness of the European cultural and creative sectors, in particular of the audiovisual sector, with a view to promoting smart, sustainable and inclusive growth.
Specific objectives	(a) support the capacity of the European cultural and creative sectors to operate transnationally and internationally; (b) promote the transnational circulation of cultural and creative works and transnational mobility of cultural and creative players, in particular artists, as well as to reach new and enlarged audiences and improve access to cultural and creative works in the Union and beyond, with a particular focus on children, young people, people with disabilities and under-represented groups; (c) strengthen the financial capacity of SMEs and micro, small and medium-sized organisations in the cultural and creative sectors in a sustainable way, while endeavouring to ensure a balanced geographical coverage and sector representation; (d) foster policy development, innovation, creativity, audience

Type of objective	Objective
	development and new business and management models through support for transnational policy cooperation.

Evidence of the contribution of the Training Actions to these objectives was gathered from various sources. The three figures that follow present data from the review of project data and documentation (Figure 6.1) and the survey of participants (Figure 6.2, Figure 6.3. Other sources include, the interviews of co-ordinators of Training Actions, the interviews of stakeholders and the case studies.

Figure 6.1 (Expected) Effects of training activities

What are the (expected) impacts of the activities?

Category	Value
Improved capacity of European audiovisual professionals to operate transnationally and internationally	82.5%
Improved (capacity for) transnational mobility of audiovisual professionals	54.4%
Improved capacity of audiovisual professionals for financial and business management and entrepreneurship	56.1%
Improved policy development, innovation, creativity, audience development and business and management models through transnational co-operation	49.1%
Contribution to European cultural and linguistic diversity and to the promotion of Europe's cultural heritage	43.9%
Contribution to the competitiveness of Europe's audiovisual sector with a view to promoting smart, sustainable and inclusive growth	73.7%

Source: MEDIA Project data

Figure 6.2 Creative Europe Training Actions – long-term benefits to the sector
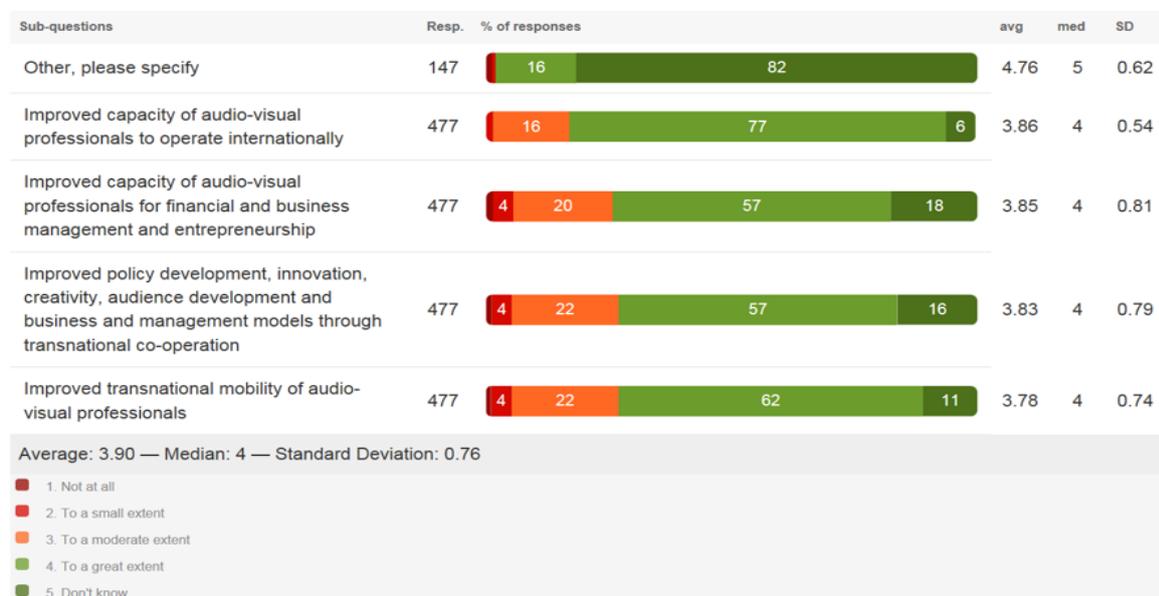
Source: Participant survey (n=477)

Figure 6.3 Overall impacts of Training Actions
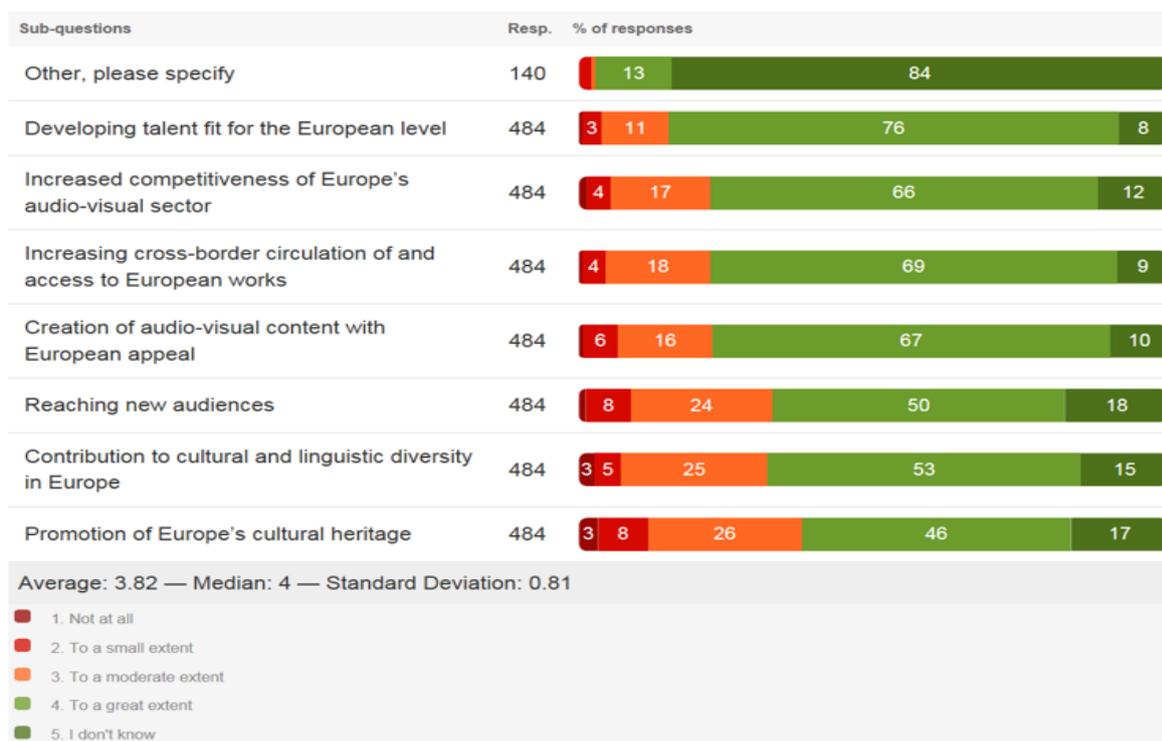
Source: Participant survey (n=484)

In terms of the contribution to the specific objectives, the evidence suggests a number of findings.

The Training Actions are making most contribution to the objective of **improving the capacity of European audiovisual professionals to operate transnationally and internationally**. The review of documentation for all 58 Training Actions highlighted that this was the most important effect, being strongly present in more than 82% of Actions. Some 12 out of the 13 co-ordinators interviewed believe that the Training Actions have improved the capacity of professionals to operate internationally to a "great extent". Some 77% of participants responding to the survey reported that the Training Actions were improving capacity "to a great extent" and another 16% "to a moderate extent". Similarly, the impact most commonly reported by participants was "developing talent for the European level" (76% "to a great extent", 11% "to a moderate extent"). Qualitative evidence from the interviews and the case studies suggests that this effect arises in part from the content of training but in particular from the method of delivery (in locations in different countries), the staff involved (tutors and industry experts working in different countries), the mix of participants (professionals of many different nationalities, working in many different countries). Moreover, the strong element of networking and follow-up, involving experts and alumni, tends to reinforce the positive benefits that arise during the training itself.

Training Actions are making an important contribution to the **capacity of audiovisual professionals for financial and business management and entrepreneurship**. As shown in Section 3, this is a key skills gap, which reflects the fact that much of the training for audiovisual professionals has not included business management and entrepreneurial skills. The project documentation shows that more than half of all Training Actions (56%) are focused on achieving a significant impact in this area. Some 11 of 13 co-ordinators interviewed also reported that the Training Actions were contributing to this objective "to a great extent". The survey of participants produced a similar response, with 57% reporting that the Training Actions were improving such skills "to a great extent" and another 20% "to a moderate extent". As we have seen in Sections 4 and 5, this arises through formal training that specifically focuses on these skills, as well as through practical support in bringing products to market, for example, pitching to possible funders and co-producers.

Training Actions are making an important contribution to **improving the (capacity for) transnational mobility of audiovisual professionals** (at least for those participating in the Actions). The project documentation shows that more than half of all Training Actions (55%) are focused on achieving a significant impact on participant mobility. This is reinforced by the interviews of co-ordinators, with 7 out of 13 reporting that mobility of participants was improved "to a great extent" and another 4 "to a moderate extent". Participants were slightly more positive on this point, with 62% of respondents reporting improved mobility "to a great extent" and another 22% "to a moderate extent". It is interesting to note that the impact on transnational mobility, although reasonably high, is considered to be significantly lower than the impact on the capacity to operate transnationally. The qualitative evidence from interviews and case studies suggests two explanations: first, many participants are already working in another country on a regular or permanent basis and therefore do not particular need help from the Training Actions to establish themselves in another country; second, the overriding concern of participants is to have the skills to operate internationally and/or take their products to an international market, rather than to find work in another country on a permanent basis.

Although the Training Actions are focussed on supporting individual professionals, there is evidence that they are **contributing to the transnational circulation of European audiovisual works and reaching new and enlarged audiences**. Of the participants responding to the survey, the majority reported that the Training Actions were having an impact on: cross-border circulation of and access to European works (69% "to a great extent", 18% "to a moderate extent"), creation of audiovisual content with European appeal (67% "to a great extent", 16% "to a moderate extent") and reaching new audiences (50% "to a great extent", 24% "to a moderate extent"). These findings reflect the characteristics of Training Actions discussed in Section 5: many focus on enabling participants to develop new works or products and take them to the market. In that way, training is integrated into to the process of creating, producing and distributing new audiovisual works.

Training Actions are making some contribution to **policy development, innovation, creativity, audience development and business and management models through transnational co-operation**. The project documentation shows that just fewer than half of the 58 Actions are expected to have an impact in this area. Some 8 out 13 of the co-ordinators interviewed believed that the Actions are contributing to this objective "to a great extent" and another 4 "to a moderate extent". Of the participants, 57% reported that the Training Actions were having such an impact "to a great extent" and another 22% "to a moderate extent".

The evidence also suggests a contribution to the general objectives of Creative Europe.

The Training Actions have primarily contributed to **strengthening the competitiveness of the European audiovisual sector**. The review of project documentation identified this as the second most-commonly expected impact (74% of Training Actions) after improved capacity of professionals to work internationally. Equally, 12 out of 13 co-ordinators expressing a view believe that the Actions contribute to this objective "to a great extent" and the other two "to a moderate extent". The participants were also positive, although slightly less so: 66% saw the Training Actions as increasing the competitiveness of Europe's audiovisual sector "to a great extent" and another 17% "to a moderate extent". Given the findings already presented above, it is reasonable to conclude that competitiveness is strengthened primarily by improving the skills and capacity of individuals to operate transnationally, but also through those individuals being better equipped to run audiovisual businesses as well as create, produce and bring to market better audiovisual products.

In contrast, the Training Actions have made a useful but less significant contribution to **promoting Europe's cultural and linguistic diversity and its cultural heritage**. This was the expected impact least commonly identified by the project review, although still reported for nearly 44% of projects. This was reflected in the interviews of co-ordinators: 7 out of 13 considered the Training Actions to be contributing to cultural and linguistic diversity "to a great extent" and the other 6 "to a moderate extent". Similarly, with regard to the Action's contribution to promoting Europe's cultural heritage, 7 of 13 co-ordinators saw the Actions as contributing "to a great extent" and 5 "to a moderate extent" and one, and 1 "to a small extent". Participants also considered these to be less significant than nearly all the other impacts mentioned, although still important: 53% considered the Training Actions to be contributing to European cultural and linguistic diversity "to a great extent" and 25% "to a moderate extent"; 46% saw them as promoting Europe's cultural heritage to a great extent and 26% "to a moderate extent". Based on the interviews and the case studies, it would seem that the Training Actions are

focussed on equipping individuals to operate in an environment where concerns for cultural diversity heritage are not absent but where commercial considerations are paramount.

6.3   European added value

European added value (EAV) refers to the additional value created by actions at EU level, compared to the actions of individual Member States alone. It may result from different factors, e.g. coordination gains, legal certainty, greater effectiveness or complementarities. It reflects broader European relevance and significance of the action with a view to presenting models and mechanisms which can be applied not only regionally or nationally but also EU widely.

The EAV of Training Actions can be assessed by looking at the following aspects:

- *Volume effects*: MEDIA adds to existing action, either by supporting national action in general ("mirroring") or specific areas of national policy ("boosting").

- *Scope effects*: MEDIA "broadens" existing action by providing training or supporting professionals that would not otherwise receive support and/or offering a transnational dimension.

- *Innovation*: MEDIA supports new approaches to training that are then mainstreamed into the education and training system and/or disseminated to a wider set of providers.

- *Process effects*: MEDIA influences the wider policies or activities of Member States or other sector stakeholders.

- *Symbolic added value*: MEDIA raises the profile of the audiovisual sector and of professionals working therein, highlights skill needs and demonstrates good practice in meeting those needs.[93]

The figure below presents quantitative evidence relating to different forms of EAV offered by the Training Actions.

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[93] Typology of effects has been adapted from: European Commission DG EMPL (2008), A framework to describe the Community Added Value of the European Social Fund.

Figure 6.4 (Expected) EAV of training activities

What is the (expected) EU added value of the activities?

Volume effects: MEDIA adds to existing action, either by supporting national action in general ("mirroring") or specific areas of national policy ("boosting")	47.4%
Scope effects: MEDIA "broadens" existing action by providing training or supporting professionals that would not otherwise receive support and/or offering a transnational dimensions	66.7%
Innovation: MEDIA supports new approaches to training that are then mainstreamed into the education and training system and/or disseminated to a wider set of providers	38.6%
Process effects: MEDIA influences the wider policies or activities of Member States or other sector stakeholders	12.3%
Symbolic added value: MEDIA raises the profile of the audiovisual sector and of professionals working therein, highlights skill needs and demonstrates good practice in meeting those needs	49.1%

Source: MEDIA Project data

The figure below summarises the corresponding survey responses of participants in Training Actions.

Figure 6.5 European Added Value of Creative Europe Training Actions

39. To what extent have the Creative Europe Training Actions added value the European level

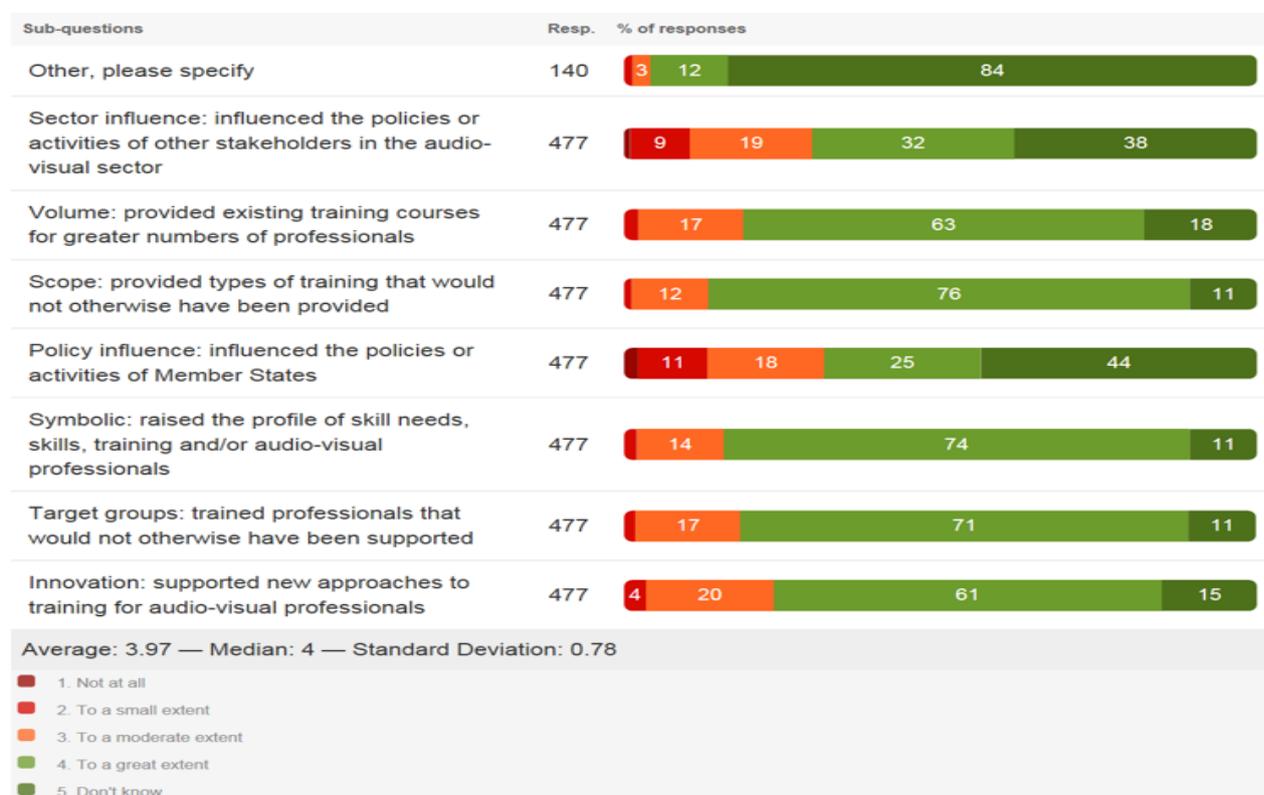| Sub-questions	Resp.	% of responses				
Other, please specify	140	3	12		84	
Sector influence: influenced the policies or activities of other stakeholders in the audio-visual sector	477	9	19	32	38	
Volume: provided existing training courses for greater numbers of professionals	477		17	63	18	
Scope: provided types of training that would not otherwise have been provided	477		12	76	11	
Policy influence: influenced the policies or activities of Member States	477	11	18	25	44	
Symbolic: raised the profile of skill needs, skills, training and/or audio-visual professionals	477		14	74	11	
Target groups: trained professionals that would not otherwise have been supported	477		17	71	11	
Innovation: supported new approaches to training for audio-visual professionals	477	4	20	61	15	

Average: 3.97 — Median: 4 — Standard Deviation: 0.78

- 1. Not at all
- 2. To a small extent
- 3. To a moderate extent
- 4. To a great extent
- 5. Don't know

Source: Participant survey (n=477)

Evidence from different data sources allows us to draw some conclusions about the different types of EAVE offered by the Training Actions.

"Scope effects" are the most important form of EAV offered by the Training Actions, i.e. they have broadened existing action (at national or sectoral level) by providing training or supporting professionals that would not otherwise have received support and/or offering a transnational dimension. The project review identified that this was an important expected impact of two-thirds of the projects (67%). This was reinforced by the 12 co-ordinators that offered an opinion on this point, all of whom agreed that the Training Actions had contributed "to a great extent" in terms of providing types of training that would not otherwise have been provided. Similarly, this was the form of EAV most commonly-reported by training participants: 76% believing the Actions had contributed scope effects "to a great extent" and another 12% "to a moderate extent". In addition, 71% of participants reported that the Training Actions had trained professionals that would not otherwise have been supported "to a great extent" and another 17% "to a moderate extent". This was supported by the co-ordinators, with 12 out of the 13 interviewed reporting that his has been the case "to a great extent".

Training Actions offer important "symbolic" value by raising the profile of skill needs, training and audiovisual professionals. This was the second most important

form of EAV, identified as a significant expected impact in 49% of Training Actions. Similarly, 74% of participants reported that this form of EAV as arising "to a great extent" and another 14% "to a moderate extent". Based on the interviews and the case studies, this form of EAV arises in part from the profile and prestige associated with the MEDIA "brand" and with EU support in general, as well as from the various dissemination activities undertaken through Creative Europe. For example, such symbolic value has particular resonance when participants pitch their works at Access to Market or other industry events.

"Volume effects" are considered to be important in terms of offering existing forms of training to a larger and more diverse number of participants. Indeed, this form of EAV featured in nearly one half of the Training Actions (47%). It was reported by 63% of participants to be generated "to a great extent" and by another 17% "to a moderate extent". Of the co-ordinators offering an opinion, 13 out of 13 also reported "to a great extent". This finding requires some clarification in that it relates to existing training being adapted and internationalised and thus offered to participants that would not otherwise benefit rather than merely offered to a larger number of people. Moreover, the total number of participants remains low in absolute terms, for example, in relation to the total number of professionals in the audiovisual sector. Clearly, the Training Actions have not served the volume of participants as, for example, in the mobility strands of Erasmus+ or in the European Social Fund. In that sense, the Training Actions have not yet had a systemic and widespread impact on the sector through serving a critical mass of professionals; there is a need for activities of the Training Actions to be taken up more widely for such impact to occur.

Training Actions are not primarily focussed on providing innovative forms of training, although there are instances of innovation. The project review highlighted that only 39% of Training Actions were likely to develop innovative forms of training that had the potential to be mainstreamed. Similarly, only 8 out of 14 co-ordinators interviewed reported that the Actions supported new approaches to training for audiovisual professionals "to a great extent", whilst 4 reported "to a moderate extent" and 2 "to a small extent". A similar proportion of participants felt that the Actions supported new approaches to training for audiovisual professionals (61% "to a great extent" and "20% to a great extent"). These findings are consistent with the findings in Section 5.3: innovation tends to consist of the package of support offered, the international dimension and the mix of participants, rather than in terms of teaching methods or pedagogies.

Although highly valued and effective in themselves, **the Training Actions are having only a limited impact on wider policy and practice in the audiovisual sector**. The project review highlighted only about one in eight Actions (12%) as being likely to influence the wider policies or activities of Member States or other sector stakeholders. This form of EAV was also the least reported by co-ordinators: 6 out of 14 interviewed reported that influenced the policies or activities of Member States to a great extent and 3 to a moderate extent". Seven out of 14 respondents reported that the Actions had influenced the policies or activities of other stakeholders in the audiovisual sector "to a great extent" and 6 "to a moderate extent. Participants were less positive: only 25% reported influence on policy "to a great extent" and 18% "to a moderate extent"; and only 32% reported influence on the activities of other sector stakeholders "to a great extent" and 19% to a moderate extent".

Taking these findings on EAV together (and taking into account the earlier findings in sections 4, 5 and 6.2), we can see that the Training Actions are providing a particular approach to the provision of training – with its international dimension and support for professionals to take works to market – that would not otherwise exist without the support of the MEDIA Sub-programme. The Training Actions are not able to support a large volume of participants given the modest funding available, although they are supporting professionals that would not otherwise receive such support. Although the training is unique and thus complements national provision and there are innovative elements in the package of support, the approaches generated by Training Actions are not being replicated across the sector or supported by mainstream public funds; clearly, the national nature of such funds makes this difficult.

This situation raises some questions about what the overall aim of the Training Actions should be: to mainstream good practice into the wider policies and programmes of the Member States; to encourage the sector to adopt these approaches on a wider basis; to expand EU funding so that a larger volume of participants can benefit; or to enable the Training Actions to become sustainable on a commercial basis? In that context, it may also be useful to consider what model of support could enable the kind of support offered by the Training Actions to be sustained, expanded and adopted more widely. Here, we can suggest some possibilities that could be considered as and when the successor programme to Creative Europe is designed. They include:

- Mixed-model: as at present, there could be continued subsidies to create Training Actions complemented by scholarships for certain professionals, e.g. in low capacity countries;

- Supply-driven: a discontinuation of scholarships, with more funding committed to establishing a larger number of Training Actions;

- Demand-driven: diversion of more/all Training Action funds into scholarships. Participants would receive a voucher and participate in the Training Action of their choice.

- Pump-priming: high funding to establish the Training Action, then tailing off to nothing over a period of 3-4 years, in order for the Training Action to become self-sustaining on a commercial basis in the long-run (perhaps with scholarships continuing).

For the demand-driven and pump-priming models, it might also be useful to consider introducing a MEDIA accreditation or quality mark for approved Training Actions. Those Actions could then receive trainees with MEDIA scholarships as well as paying participants.

6.4 Bridges and cross-overs to other sectors

Moving beyond the audiovisual sector, an analysis of wider impacts of Creative Europe Training Actions can provide a more holistic picture of its added value. These impacts relate to:

- Potential benefits for other sectors covered by Creative Europe;

- Key success factors and lessons learned from delivery that have relevance to training for professionals in other sectors covered by Creative Europe; and

- Potential for dissemination and replication of good practice examples and key success factors in training for professionals in other sectors covered by Creative Europe.

Training providers provided feedback on these wider impacts. As regards wider take-up of training, and mainstreaming good practice, training providers confirm benefits of their projects. These pertain to other workshops being launched inspired by existing projects, wider dissemination at festivals and film markets, or raising the visibility of niche subsectors such as animation documentaries.

As regards cross-overs into other cultural sectors, training providers interviewed mention the gaming industry or cooperation with museums on visual installations, cooperation with the performing arts, design and 'immersive arts' combining virtual reality and cross-media projects. Some workshops are also attended by theatre professionals and journalists. However, one organiser states that the current structure of the Creative Europe Programme does not reflect the potential for cross-overs into other cultural sectors and leaves some of this potential untapped.

Furthermore, online survey responses are instructive regarding some cross-over benefits of the Training Actions, as shown in the figure below:

Figure 6.6 Effectiveness of Training Actions in relation to wider benefits
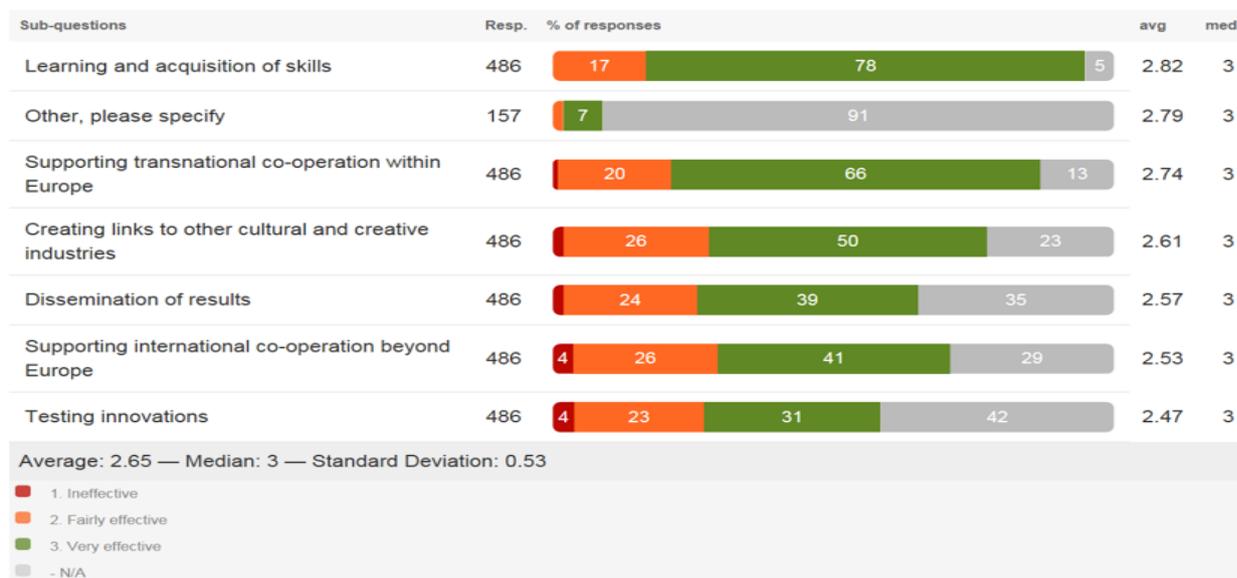
Source: Participant survey (n=486)

Unsurprisingly, participants particularly emphasise the effectiveness in relation to the learning and the acquisition of skills. But they also acknowledge the benefits in terms of supporting transnational co-operation within Europe, and in creating links to other cultural and creative industries. To a lesser extent, benefits are also recognised with regard to dissemination of results and supporting transnational co-operation beyond Europe, with some respondents referring to concrete examples of international projects they launched after participating in a Training Action. The testing of innovations is seen as another wider benefit. In commenting on this question, some respondents appreciate

the efforts undertaken by training providers in keeping the networks created during the training alive afterwards.

Training providers confirm the relevance of the learning and acquisition of new skills (average score of 10 on a scale from 1 to 10) and strengthening international business cooperation (average score of 9) to the skill needs of audiovisual professionals.

7.0 SYNERGIES WITH ACCESS TO MARKET ACTIONS

7.1 Access to Market Actions

The Creative Europe Programme supports Training Actions as part of a portfolio of broader support for the audiovisual sector. This portfolio also includes "Access to Market Actions", which offer opportunities for European organisations to increase access to markets through a variety of means, including exchanges, increasing the visibility of works, or improving the circulation of works.

The operational objectives of the Access to Markets Actions are to facilitate business-to-business exchanges, having as expected results and impact – some of which are similar to those of the Training Actions (notably 2-4):

1. The improvement of the European/international dimension and effectiveness of existing large industry markets and to increase the systemic impact of smaller initiatives;

2. An increase in the visibility of professionals and audiovisual works from European countries with a low production capacity;

3. An increase in the number of European co-productions and a greater diversification of talents and sources of funding; and

4. The improvement of the competitiveness and circulation of European audiovisual works on international markets.[94]

Access to Market activities must fit into one of three categories, as shown in Table 7.1.

Table 7.1 Eligible activities within Access to Market Actions

Access to Market Action	Eligible activities
1: Access to physical markets for European audiovisual professionals	Activities to improve conditions governing access for European professionals, projects and works to professional audiovisual markets, such as co-production and financing initiatives and events and/or trade event and markets for finished works. Mechanisms can be of financial nature (discount rates, invitation of professionals etc.) or of operational nature (assistance offered to professionals, various dedicated networking activities etc.).
2: Online tools intended for audiovisual professionals	Creation and development of a database and/or a network of databases of European programmes and/or professionals of the audiovisual sector, intended for professionals. Creation and development of tools on the European audiovisual and/or cinema industry targeted at the professionals.
3: Common European	Common promotional activities organised by pan

[94] Creative Europe MEDIA Sub-programme Support for Access to Market: Guidelines .

Access to Market Action	Eligible activities
promotional activities	European networks or organisations aimed at facilitating the distribution and circulation of European audiovisual and/or cinematographic works and the networking of European professionals. Promotional initiatives and platforms aimed at creating innovative ways of distributing/releasing of European audiovisual and cinematographic works and encouraging the networking and exchange of information and good practices between professionals.

One of the Main Tasks of this study has thus been to explore synergies between the Training Actions and the Access to Market Actions. This section presents the results of that analysis.

7.2 Synergies between Training Actions and Access to Market Actions

Of the three Access to Market Actions, the first offers most potential for overlap and even duplication with the Training Actions, whilst the second and third tend to be more complementary.

It is clear that **there is potential for complementarity and/or overlap between Access to Market Action 1 ("Access to physical markets") and the Training Actions**. As we have shown in section 5, the Training Actions enable professionals to acquire skills primarily through the development of specific projects, which in many cases they are supported to take to market. This process naturally involves collaboration with and support from other professionals, support with pitching ideas or finished works to potential funders, co-producers or distributors and enabling access to international professional markets, including film festivals and other events. Training Actions are thus ultimately not only about the acquisition of skills but also about enabling access to international professional markets in a very tangible way; indeed, this is one of their stated aims.[95] More specifically, the potential for overlap and/or synergies may be as illustrated in the table below.

Table 7.2 Comparison of Access to Market Actions to Training Actions

Access to Market Action	Potential synergies or overlap with Training Actions
1: Access to physical markets for European audiovisual professionals	Training Actions may support participants to take their works to market through support similar to that offered by the Access to Market Actions (potential overlap) or at events organised by Access to Market Actions (potential complementarity). However, Training Actions generally intervene "upstream" of Access to Market Actions.
2: Online tools intended for audiovisual professionals	Some Training Actions develop new online tools for learning, professional development and networking, some of which may be made available to non-participants. Depending on the content and the target users, these

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[95] Creative Europe. MEDIA Sub-programme. Support for training. Guidelines. p. 4f.

Access to Market Action	Potential synergies or overlap with Training Actions
	may complement or (less commonly) overlap with tools developed by the Access to Market Actions.
3: Common European promotional activities	Participants in Training Actions may be supported to distribute their works via these common European promotional activities (complementarity).

Interviews with stakeholders and the Training Actions themselves also confirmed that **Access to Market Actions also support the provision of skills**. They reported that Access to Market Actions particularly support the acquisition of skills relating to leadership, innovation and entrepreneurship, as well as interpersonal, social and cross-cultural skills. Access to Market Actions and events contribute rather naturally to these types of skills, which fundamentally involve networking and engaging with other stakeholders. One stakeholder said that "*things are moving in the right direction. When cooperating with Canadian and Asian partners, also ask them to bring financiers to their events to strengthen link with access to market*".[96] To a lesser, but still noticeable, extent, audiovisual professionals also benefit from deriving business management skills where Access to Market activities involve pitching and networking with financiers. However, the opportunity for audiovisual professionals to attend these types of events – and for the finance and banking sector to be invited – were fewer. Moreover, it was widely acknowledged that audiovisual professionals were in need of developing pitching skills in order to better take advantage of such networking opportunities.

The research also shows that **there are synergies "on the ground" between Training Actions and Access to Market Actions, particularly Action 1 (Access to physical markets)**. Only about one in four of those organising Training Actions felt able to comment on links with Access to Market Actions. But those who did, reported that synergies are mostly manifested through opportunities for training participants to attend Access to Market events, showcasing what they have developed during training and gaining the opportunity to access potential collaborators. Interviewees clearly see benefits of holding both Training and Access to Market activities at the same place and time in terms of efficiency and complementarity. They also point out that there is widespread collaboration and interaction between beneficiaries of different Training Actions and Access to Market Actions, both in terms of creating visibility for each other's activities as well as cross-participation. For example, Cartoon Masters had enabled participants to benefit from Access to Market activities, including pitching events. Similarly, the Crossing Borders project reported that it attended Access to Market events. However, none of the interviewees mentioned specific cases of synergies with Action 2 (Online tools).

There are also instances of beneficiaries receiving funding for Training Actions as well as Access to Market Actions and thus implementing them in such a way as to promote synergies. These are not numerous, although they include the Berlinale, which received funding for the "Berlinale Co-Production Market" from the first call for proposals within the Access to Market Actions. As would be expected, there has been close co-operation between the Berlinale Training Action and the co-production market, as well as with other film markets and co-production markets.

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[96] Interview feedback.

These findings are supported by the evidence from the survey of participants in Training Actions. Respondents to the survey reported complementarity between Training Actions and all of the Access to Market Actions. Again, complementarity was strongest with Action 1 (Access to physical markets).

Figure 7.1 Complementarity between Training and Access to Market activities

43. **To what extent do the Creative Europe Training Actions complement the "Access to Market" activities supported by Creative Europe:**

Sub-questions	Resp.	% of responses				avg	med	SD
Common European promotional activities	477	5	23	38	32	3.97	4	0.91
Online tools for professional	477	9	25	25	40	3.94	4	1.06
Access to physical markets for European professionals	477		21	56	20	3.93	4	0.73

Average: 3.94 — Median: 4 — Standard Deviation: 0.91

- 1. Not at all
- 2. To a small extent
- 3. To a moderate extent
- 4. To a great extent
- 5. Don't know

Source: Survey of participants in Training Actions (n=477)

The research also identified anecdotal evidence that **some applicants are unsure of the distinction between Training Actions and Access to Market Actions and therefore unsure of which Action they should apply to**. Although none of the interviewees could provide an estimate of the number of projects involved, there was a sense among training providers that opportunities were lost as ideas/applications fell in the "gap" between the different Actions and were ultimately unsuccessful or not submitted. A few mentioned that they had submitted unsuccessful applications to the Access to Market Action with the feedback suggesting that the application would have been more relevant to the Training Actions. Interviewees all expressed that they would welcome a clarification as to which activities should be applied for under which Action.

It is also worth noting that the **total funding available for Training Actions and for Access to Market Actions is modest** in absolute terms and as a proportion of the total budget for the MEDIA Sub-programme. As noted above, just less than €8m was allocated to the first round of Training Actions. Similarly, the first two round of Access to Market Actions received around €8m.[97] Together, this total of €16 million per year represents around 14% of the total funding of MEDIA, which has a total budget of at least €819m in 2014-2020 or an average of €117m per year.[98]

Given the potential for overlap, the uncertainty of applicants and the modest funding available, **there is a case for considering a merger between the Training Actions and the Access to Market Actions**. Several interviewees advocated such a merger, arguing that these initiatives are so interlined that they cannot be looked at separately;

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[97] Call for proposals EAC/S26/2013.
[98] The Creative Europe Regulation specifies that at least 56% of the total programme budget of €1,462,724,000 will be allocated to the MEDIA Sub-programme.

both involve the acquisition of skills and both are ultimately about enabling professionals to access international markets. Moreover, such a merger would reduce the administrative burden incurred by EACEA in organising separate calls for the different Actions and for applicants who have to develop separate projects.

At the same time, **it is essential to ensure that the focus on skills acquisition through structured training is not lost**. Indeed, it is clear that much of activity related to skills acquisition only occurs within Training Actions and not within Access to Market Actions. As one interviewee explained:

> *"Competition is per se not an element of training and should not be part of it, as we need to create trust and build up confidence to have an impact as a training programme.*
>
> *In my opinion, both training and markets are two highly specialised fields/activities with very different methodologies, different impact and only partly overlapping goals.*
>
> *Also, in the training programmes the producers from all over Europe work together in depth over a long period of time and creating a professional network for the longer future. This is not possible during a market to the same extent. But the markets are very efficient when it comes to closing the financing for projects that are already developed and for matchmaking. They are important for our industry but their format is developing and they now have a bigger responsibility in terms of distribution".*

Overall then, it might therefore be beneficial to consider a restructuring of the MEDIA Sub-programme, in such a way as to reduce the potential for duplication, increase synergies and reduce programme management costs, without losing the unique focus on skills acquisition that is currently offered by the Training Actions.

8.0   CONCLUSIONS AND RECOMMENDATIONS

The main objectives of the study have been to identify skill gaps in the audiovisual sector, evaluate the relevance efficiency and effectiveness of Training Actions in contributing to closing these gaps and to formulate recommendations. Based on the analysis of data presented in the previous sections, this section therefore presents the overall conclusions for the study and a set of recommendations for the European Commission and the EACEA.

8.1   Conclusions

The general objectives of the Creative Europe Programme are to strengthen the competitiveness of Europe's cultural and creative industries and to safeguard, develop and promote cultural and linguistic diversity. This translates into specific objectives, including those relating to the capacity of the sector to operate transnationally and to the promotion of the transnational circulation and works and the transnational mobility of players. Within the MEDIA Sub-programme, one of the priorities is to reinforce the sector's capacity to operate transnationally through improving skills and competences, increasing the capacity of operators to develop works and encouraging business-to-business exchanges.

In drawing conclusions, we thus consider the extent to which and the ways in which the MEDIA Training Actions have contributed to those objectives.

1. **MEDIA Training Actions are relevant to the needs of audiovisual professionals in the industry**. The selection process prioritises projects that address proven needs but is not unduly prescriptive; training providers can design training that responds to the skill needs that they identify, in a dynamic and fast-changing marketplace. As a result, Training Actions are addressing current skill needs of fundamental importance, i.e. the need for audiovisual professionals to:

   - continually update craft-skills/technical skills, e.g. in light of technological developments, as well as multi-skilling;

   - acquire entrepreneurial and business management skills;

   - develop career skills based on the need to work on a project basis (in an insecure environment) and learn how to bring works to market; and

   - develop new business models and new ways of monetising content in a digital environment.

2. **The "approach" of Training Actions is unique, highly valued and effective**. The feedback from participants and other stakeholders is consistently positive regarding the quality and effectiveness of the Actions. As intended, there is considerable diversity in the Training Actions in terms of content, format and participation. However, there are certain characteristics that are common to the Actions and that make them effective, i.e. they are:

   - Up-to-date: Training Actions address current needs arising from developments in the industry (e.g. often related to technology or financing), in large part through the use of active professionals as trainers, experts or mentors;

   - Transnational: of course, all projects must demonstrate a transnational dimension in order to be selected but Training Actions have done far more

than is required by the selection process; transnationality has been integral in terms of the content, location, participants and trainers/experts. In that sense, the Training Actions reflect the transnational nature of the sector;

- Multi-disciplinary or multi-sectoral: few of the Training Actions can be neatly categorised as addressing one particular occupation or part of the value chain. Many facilitate the acquisition of multiple skills and some deliberately choose to bring together professionals working at different parts of the value chain;

- Highly relational and personalised: Training Actions typically involve the provision of support from experienced fellow professionals in relation to specific opportunities and challenges facing the participants. Such support is very often provided through one-to-one mentoring sessions, as a supplement to the tutorials and lectures.

- Project-based: participants are typically supported to develop a personal project and, in that way, acquire/improve the skills necessary to develop their careers and operate transnationally;

- Focused on delivering tangible end-products and concrete outcomes: the project-based approach means that many participants are supported to take actual products to the market. They therefore acquire not only skills but tangible business opportunities; and

- Supportive of professional networking: the face-to-face and residential format is useful not only in terms of training individuals but also as a way of facilitating the development of contacts. Such networking is reinforced by the follow-up activities that take place on a one-to-one basis (between trainers/experts and participants) and on a collective basis (involving all participants in a cohort).

3. **The MEDIA Training Actions are diverse in terms of content and skills provided**.
   - Although each Action is selected on the basis of its individual merits, the overall selection of Training Actions is diverse and addresses a range of sector skill needs.

   - A diversity of occupations and parts of the value chain are served.

   - Participants tend not to lack digital skills and so the emphasis is on providing the skills need to work in a fast-changing digital environment, rather than the provision of digital skills as such.

   - There are also instances of provision for non-audiovisual professionals working in the sector, e.g. finance and legal professionals.

4. **Training Actions are innovative in the "packages" of support that they offer and in terms of their relation to current developments in the industry rather than in terms of offering new pedagogies or innovative forms of delivering training**. Innovation can also be a topic for training courses.

   - Face-to-face training is the most common form of provision.

   - Face-to-face/residential is essential to the personalised/relational approach and to building contacts and networks.

- Each Training Action typically includes different training sessions in different countries. In many Training Actions, this includes a mix of countries with high capacity and low capacity in the audiovisual sector.

- E-learning and distance learning tends to be a supplement to face-to-face/residential.

- Training is often project-based, often "real" or "live" projects, which the participants hope to develop and take to market.

- Follow-up is crucial and takes place in many ways, including on-going support by mentors, alumni events and networks.

- Training Actions include diverse and appropriate activities to disseminate their results, although there may be a need to provide more structured information about the availability of and results of training to the Creative Europe Desks on a more consistent basis.

5. **There is a good selection of participants in MEDIA Training Actions, which mostly reflects the intentions of the programme, although the total number of participants remains low due to the modest funding available.**

- The demand to participate in Training Actions generally exceeds the supply of places available (although the method of selecting participants varies and consistent data is not collected on the overall level of demand).

- Training Actions tend to carefully select, screen or even hand-pick participants and word-of-mouth recruitment is common.

- As a result, participants are active professionals working in the industry, usually with at least a few years' experience and with project ideas or ambitions that they wish pursue.

- There is a good diversity of professions/occupations represented amongst participants.

- There is a good gender balance in the cohort of participants with almost even numbers of male and female participants across the Training Actions as a whole. This is in contrast to the audiovisual sector as a whole, where women are under-represented as professionals.

- There is a diversity of nationalities and countries of operation within each Training Action and across all Training Actions, including many professionals from low capacity countries and from non-EU Member States.

- Countries with a high or medium capacity for audiovisual production are not over-represented amongst participants (relative to their population size), whilst some, though not all, countries with low capacity are well-represented.

- There is some evidence that many of the professionals participating in training funded by the 2014 round had previously participated in a Training Action.

- The focus on serving existing professionals also means that young or new professionals with limited experience tend not to be served by the Training Actions.

6. **MEDIA Training Actions deliver the intended impact on participants**. There is a consistently high rate of satisfaction amongst participants who tend to highlight the following benefits:

- New or improved skills that relate to the needs of the market, including craft-specific skills, skills to operate in a digital environment, business, leadership and management skills, and interpersonal and cross-cultural skills;

- Greater capacity to operate internationally;

- Improved access to market, in some cases including real opportunities to pitch new works and new contracts or financing secured; and

- Improved contacts and networks that endure beyond participation in the Training Action.

7. **MEDIA Training Actions provide a unique form of added value in comparison to other forms of EU support**.

- Training Actions are distinct from the support for higher education and vocational training offered by Erasmus+; whilst support from Erasmus+ facilitates transnational co-operation and learner mobility, it mostly does not provide training that is directly related to the skills that existing professionals need to operate in transnational and international markets.

- Training Actions are distinct from, albeit overlapping with other MEDIA Actions that support co-productions, development projects, Access to Market Actions, etc. They support individual professionals in a very direct way, whilst also offering a new model for how training can be provided.

8. **MEDIA Training Actions complement national provision and would not otherwise be funded by Member States**.

- National provision does not allow a transnational dimension to skills development to the same extent as the Training Actions, yet such a dimension is essential given the nature of the industry.

- In the absence of EU funding, film schools (some of which are heavily reliant on national sources of funding) have tended not to provide training with such a strong transnational dimension.

9. **Synergies and complementarities exist with Access to Market Actions but there is a risk of overlap.**

- Both types of Action support provision of skills and support access to international professional markets, albeit with different degrees of emphasis on each.

- There are instances of synergies "on the ground" whereby participants in Training Actions are supported to pitch at Access to Market events.

- There are instances of beneficiaries receiving funding for Training Actions and Access to Market Actions and implementing them in such a way as to promote synergies.

- There has been confusion amongst some applicants. Some applications have been submitted to the "wrong" Action or have fall in the "gap" between them.

10. **There is a need to make the MEDIA "approach" to training more sustainable and more widely available.**

   - The MEDIA approach to training is unique and effective. Demand for places exceeds the supply. Many or most participants pay to participate, albeit at rates that do not usually reflect the full cost of the Training Actions.

   - But there is limited evidence of training providers repeating/expanding Training Actions without EU support. Similarly, there is limited evidence of the MEDIA approach being mainstreamed within wider education system(s) for the sector.

   - The total volume of participants thus remains relatively low – reflecting the modest sums of money available from this part of the Creative Europe Programme.

   - Reflection is therefore needed on how to sustain and mainstream the MEDIA approach, i.e. in the sector and/or in national education and training systems. Without this, impact will remain modest and be limited to direct participants (low volume). The long-term aim should be to "internationalise" the audiovisual training offer, perhaps in the same way that Erasmus has helped to internationalise higher education over the last 30 years or so.

11. **Looking ahead, there is a need to consider what "model" will facilitate the sustainability, expansion and mainstreaming of transnational training for audiovisual professionals.** Models could include:

   - Mixed-model: as at present, there could be continued subsidies to create Training Actions complemented by scholarships for certain professionals, e.g. in low capacity countries.

   - Supply-driven: a discontinuation of scholarships, with more funding committed to establishing a larger number of Training Actions.

   - Demand-driven: diversion of more/all Training Action funds into scholarships. Participants would receive a voucher and participate in the Training Action of their choice.

   - Pump-priming: high funding to establish the Training Action, then tailing off to nothing over a period of 3-4 years, in order for the Training Action to become self-sustaining on a commercial basis in the long-run (perhaps with scholarships continuing).

   - For the demand-driven and pump-priming models, a MEDIA accreditation or quality mark could be considered for approved Training Actions. Those Actions could then receive trainees with scholarships from MEDIA or other sources, as well as paying participants.

12. **Training Actions have demonstrated that skills development need not be a discrete activity but can be effectively integrated into the process of creating, producing and distributing audiovisual works.**
   - This creates the possibility of new forms of support for skills development within Creative Europe.

- It might be possible to integrate support for the development of individuals' skills within European co-production funding available from the MEDIA Sub-programme.

- (Some) Training Actions could focus more explicitly on the process of creating and producing new works and taking them to market.

8.2 Recommendations

Based on the findings of the research and following on from the conclusions, we present the following recommendations.

Strategic recommendations for the current period

1. The MEDIA Sub-programme should **continue to provide support for the Training Actions**, given the need for such support in the audiovisual sector, the demand expressed by applicants and the effectiveness of the Training Actions to date. The selection criteria should continue to prioritise Training Actions with broadly similar characteristics to those supported in the current programming period. Innovation should continue to feature as a topic in itself and as a feature of other topics, e.g. skills in using innovative forms of production or new technologies' or in adopting innovative forms of financing.

2. The Commission and the EACEA should **promote wider change in the training available for audiovisual professionals by disseminating policy lessons** targeted at national policymakers and sector stakeholders. Such policy lessons would relate to the potential of training to address current industry needs by adopting an approach that is transnational, multi-disciplinary or multi-sectoral, relational and personalised, project-based, focused on delivering tangible end-products and concrete outcomes and supportive of professional networking.

3. The Commission and the EACEA should **explore ways to promote the sustainability of the Training Actions on a commercial basis** as one possible means of ensuring their sustainability. This could be done through further consultations of the Training Actions and of sector stakeholders and through the dissemination of good practice, for example, through events organised by the European Commission.

4. The Commission and the EACEA should **consider calls for Training Actions that are dedicated to new or young professionals** with limited professional experience.

5. The Commission and the EACEA should consider **calls for proposals that combine Training Actions and Access to Market Actions** on a pilot basis. The experience of selected projects would then inform the design of any successor programme to Creative Europe.

Operational recommendations for the current period

6. The Commission and the EACEA should **consider the relative merits of allowing professionals to participate in training provided by more than one Training Action** (or that have participated in MEDIA-supported training in the previous period). One possibility would be for such participants to pay a fee broadly equivalent

to the average cost per person of providing the training. The Commission and EACEA's choice in this matter will reflect the overall aim of the Training Actions; for example, if the aim is to maximise the number of professionals supported, then this would suggest that repeat participations should be discouraged; if the aim is to provide more "holistic" in-depth support for professionals, then repeat participation would be desirable.

7. The EACEA should **provide greater clarity or information on the distinction between the Training Actions and the Access to Market Actions**, for example, through revising relevant sections of programme guidelines.

8. The Commission and the EACEA should **promote synergies between the Training Actions and loan guarantee facilities, including any supported by EU funds**. This could include networking between the Training Action co-ordinators and financial intermediaries. Training providers supported by the Training Actions could also be encouraged to refer participants to financial intermediaries.

9. The Commission and the EACEA should consider whether it is desirable to **require Training Actions to provide data on the level of demand** for their training courses on a consistent basis.

10. The Commission and the EACEA should consider whether it is necessary to **require Training Actions to provide information about the availability of and results of training to the Creative Europe Desks** on a more consistent basis. This would help make professionals in low capacity countries more aware of training courses and increase transparency regarding EU support for Training Actions.

Recommendations for the next period

11. The Commission should **clarify the overall aim of the Training Actions**, i.e. whether the intention is to support pilot projects that are then sustained on a commercial basis or with other funding or to support a large number of participants (which would require an increase in EU funding) or to internationalise the sector's training offer more generally.

12. The Commission should **consider what model of support for training for audiovisual professionals is most appropriate** in the next period. The current "mixed" model could be continued or it could be replaced by a wholly "demand-driven", a wholly "supply-driven" or a "pump-priming" approach.

13. The Commission should **consider creating a MEDIA Training Action quality mark**, which would be acquired by training courses satisfying certain "essential requirements", whether supported by EU funds or not. Amongst other things, such training courses would be eligible to host participants in receipt of Creative Europe scholarships.

14. The Commission should **consider whether Training Actions should be allowed or required to focus more explicitly on the process of creating and producing new works and taking them to market**.

15. The Commission should **consider clarifying the distinction between the Training Actions with the Access to Market Actions** or creating possibilities for projects that involve both types of activity.

16. The Commission should **consider increasing the possibilities for training** or mentoring **to be integrated into other forms of support available under Creative Europe**.

17. The Commission should **consider whether the Training Actions merit replication as a discrete strand within any successor to the current Erasmus+ programme**, for all sectors not only the audiovisual sector. As in MEDIA, training for professionals would address current industry needs by adopting an approach that is transnational, multi-disciplinary or multi-sectoral, relational and personalised, project-based, focused on delivering tangible end-products and concrete outcomes and supportive of professional networking.

ANNEX ONE: SURVEY QUESTIONNAIRE

TRAINING ACTIONS WITHIN CREATIVE EUROPE MEDIA SUB-PROGRAMME

Introductory e-mail to successful participants in Training Actions

[Email subject] Training Actions Within Creative Europe: Survey of participants in training

Dear Sir or Madam

We would like to invite you to participate in a survey of participants in Training Actions co-financed by the EU's Creative Europe MEDIA Sub-programme.

The purpose of the survey is to collect
- information on the characteristics of audiovisual professionals participating in Training Actions co-financed by the Creative Europe MEDIA Sub-programme;
- the opinions of participants regarding the effects of these Training Actions.

The survey is being undertaken by the Centre for Strategy and Evaluation Services (CSES) on behalf of the European Commission DG Communication Networks, Content and Technology.

The survey will take no more than 15 minutes to complete. Your responses will be treated in confidence.
Please click on your preferred language to enter the survey.

English	Français

THANK YOU FOR YOUR ASSISTANCE

Centre for Strategy and Evaluation Services
Contact: MEDIA@cses.co.uk

Survey welcome page

Welcome to the survey of participants in Training Actions co-financed by the Creative Europe MEDIA Sub-programme.

The Centre for Strategy and Evaluation Services (CSES) is currently reviewing of the Training Actions on behalf of the European Commission DG Communication Networks, Content and Technology. As part of the evaluation, we are inviting audiovisual professionals participating in Training Actions to provide us with:

- information about them;
- information about the training that they participated in;
- their opinions about the effects of these Training Actions.

IF YOU HAVE PARTICIPATED IN TRAINING PROVIDED BY DIFFERENT MEDIA TRAINING ACTIONS, PLEASE COMPLETE A SEPARATE SURVEY RESPONSE FOR EACH.

The results of the survey will be analysed by CSES. They will inform the final report of the study, which will be completed later in 2016.

Your responses will be treated in confidence. Individual respondents will not be identified in the final report of the study.

If you have any questions about the survey or the evaluation or if you would like to complete the survey by email or post, please contact us at MEDIA@cses.co.uk.

For other queries about the Creative Europe Programme please contact either

- Education, Audiovisual and Culture Executive Agency
- Creative Europe Desks in your country.

To enter the survey, please click on the button below.

Next

Question	Response
Information about the participant	
1. What is your nationality?	• Albania • Austria • Belgium • Bosnia and Herzegovina • Bulgaria • Croatia • Cyprus • Czech Republic • Denmark • Estonia • Finland • France • FYROM • Germany • Georgia • Greece • Hungary • Iceland • Ireland • Italy • Latvia • Lithuania • Luxembourg • Malta • Moldova • Montenegro • Netherlands • Norway • Poland • Portugal • Romania • Serbia • Slovakia • Slovenia • Spain • Sweden • Switzerland • Turkey • United Kingdom • Other (please state)
2. In which country do you mostly operate?	• Albania • Austria • Belgium • Bosnia and Herzegovina • Bulgaria • Croatia • Cyprus • Czech Republic • Denmark • Estonia • Finland • France • FYROM

Question	Response
	• Germany • Georgia • Greece • Hungary • Iceland • Ireland • Italy • Latvia • Lithuania • Luxembourg • Malta • Moldova • Montenegro • Netherlands • Norway • Poland • Portugal • Romania • Serbia • Slovakia • Slovenia • Spain • Sweden • Switzerland • Turkey • United Kingdom • Other (please state)
3. What type of organisation do you work for?	• Not employed/self-employed • Self-employed • Micro-enterprise (1-9 staff) • Small enterprise (10-49 staff) • Medium-sized enterprise (50-249 staff) • Large enterprise (>250 staff) • Professional association • Non-governmental organisation • Cultural institute/foundation • Educational institution • Research organisation • Regional or local authority • Government ministry • Other (please state)
4. In which field do you mostly operate?	• Film • Television • Radio • Video games • Music • Legal • Banking or finance • Education • Research • Other (please state)
5. What is your main occupation?	• Producer • Director • Writer

Question	Response
	• Script editor • Commissioning editor • Distributor • Exhibitor • Sales agent • New media content provider • Professional from the animation industry • Professional from the post-production field • Teacher/tutor • Researcher • Manager • Legal professional • Banking/financial professional • Other (please state)
6. How many years' professional experience do you have?	• 0-4 years • 5-10 years • More than 10 years
7. What is your gender?	• Female • Male • Prefer not to say
8. Have you previously participated in training supported by the MEDIA programme (before 2014)?	• Yes – more than once • Yes – once • No • Don't know
Information about the training	
In this section, we ask you about the Training Action in which you participated.	
9. Do you know the name of the Training Action which provided the training?	• Yes • No
10. Did you receive a scholarship from the Training Action?	• Yes • No
11. In what type of Training Action did you participate?	• European action (helping professionals to operate mainly in Europe) • International action (helping professionals to operate beyond Europe) • Don't know
12. What was the main purpose of the Training Action?	• Audience development, marketing, distribution and exploitation • Financial and commercial management or access to finance • Works development and production • Responding to the digitisation • Other (please state)
13. In which country did most of the training take place?	• Albania • Austria • Belgium • Bosnia and Herzegovina • Bulgaria • Croatia

Question	Response
	- Cyprus - Czech Republic - Denmark - Estonia - Finland - France - FYROM - Germany - Georgia - Greece - Hungary - Iceland - Ireland - Italy - Latvia - Lithuania - Luxembourg - Malta - Moldova - Montenegro - Netherlands - Norway - Poland - Portugal - Romania - Serbia - Slovakia - Slovenia - Spain - Sweden - Switzerland - Turkey - United Kingdom - Other (please state)
14. Which of the following types of training did you participate in? Please select all that apply	- Long-term training - Short-term training - Workshops (residential) - Workshops (non-residential) - Consulting (in person) - Consulting (online) - Internships - Online training - Lectures - Case studies - Role plays - Group sessions - One-to-one meetings - Screenings - Other (please state)
15. In which year did you first participate in the training?	2014 2015 2016
16. What kind of skills did the training mostly focus on?	- Craft-specific - ICT/digital

Question	Response
	- Entrepreneurship / business management - Interpersonal, social and cross-cultural skills - Other (please state)
17. What subjects were covered by the training? Please select all that apply.	- Project development - Company development - Production - Co-production - Post-production - Audience development, marketing, distribution & exhibition - Management & financing - Animation - Documentary - Digital & multimedia - Television series - Feature - Other (please state)
18. How many days did you participate in training?	1 day 2 days 3-10 days - More than 10 days - Not applicable - Other (please state)
19. What were the main methods/modes of delivery of the activities? Please select all that apply	- Residential - On line sessions / consulting - Tutoring/follow up - Networking - Other (please state)
Effects of the Training Action	
In this section, we ask you about the effects of the Training Action in which you participated.	
20. How relevant were the topics covered by the training?	- Very relevant - Fairly relevant - Not relevant
21. Please comment on your response	
22. How effective were the following methods? - Long-term training - Short-term training - Workshops (residential) - Workshops (non-residential) - Consulting (in person) - Consulting (online) - Internships - Online training - Lectures - Case studies - Role plays - Group sessions	- Very effective - Fairly effective - Ineffective - Not applicable

Question	Response
• One-to-one meetings • Screenings	
23. Please comment on your response	
24. How effective was the training related to the following subjects? • Project development • Company development • Production • Co-production • Post-production • Audience development, marketing, distribution & exhibition • Management & financing • Animation • Documentary • Digital & multimedia • Television series • Feature	• Very effective • Fairly effective • Ineffective • Not applicable
25. Please comment on your response	
26. How effective has the training been with respect to your skills in the following areas: • Craft-specific • ICT/digital • Entrepreneurship / business management • Interpersonal, social and cross-cultural skills • Other (please state)	• Very effective • Fairly effective • Ineffective • Not applicable
27. Please comment on your response	
28. To what extent has the Training Action been effective in providing the following benefits for you: • Learning and acquisition of skills • Gaining knowledge from peers and senior professionals • Better access to international professional markets • Better business models • Strengthened international business and cooperation • Other (please state)	• Very effective • Fairly effective • Ineffective • Not applicable
29. Please comment on your response	
30. Overall, how satisfied are you with your participation in the training?	• Very satisfied • Satisfied • Dissatisfied • Too early to say
31. How effective has the Training Action been in providing the following	• Very effective • Fairly effective

Question	Response
benefits for all participants: • Learning and acquisition of skills • Testing innovations • Supporting transnational co-operation within Europe • Supporting international co-operation beyond Europe • Dissemination of results • Creating links to other cultural and creative industries • Other (please state)	• Ineffective • Not applicable
32. Please comment on your response	
33. Overall, how effective has been the Training Action in which you participated?	• Very effective • Fairly effective • Ineffective • Not applicable
34. Please comment on your response	
35. To what extent has the Training Action had the following overall impacts: • Contribution to cultural and linguistic diversity in Europe • Promotion of Europe's cultural heritage • Increased competitiveness of Europe's audiovisual sector • Developing talent fit for the European level • Creation of audiovisual content with European appeal • Increasing cross-border circulation of and access to European works • Reaching new audiences	• To a great extent • To a moderate extent • To a small extent • Not at all • Don't know
Effects of MEDIA Training Actions	
In this section, we ask you to consider the overall impact of all the MEDIA Training Actions.	
36. To what extent are the Creative Training Actions relevant to the skill needs of audiovisual professionals?	• Very relevant • Fairly relevant • Not relevant • Don't know
37. To what extent have the Creative Europe Training Actions provided the following benefits for the audiovisual sector: • Improved capacity of audiovisual professionals to operate internationally • Improved transnational mobility of audiovisual professionals • Improved capacity of audiovisual	• To a great extent • To a moderate extent • To a small extent • Not at all • Don't know

Question	Response
professionals for financial and business management and entrepreneurship • Improved policy development, innovation, creativity, audience development and business and management models through transnational co-operation • Other (please state)	
38. To what extent have the Creative Europe Training Actions added value the European level: • Volume: provided existing training courses for greater numbers of professionals • Scope: provided types of training that would not otherwise have been provided • Target groups: trained professionals that would not otherwise have been supported • Innovation: supported new approaches to training for audiovisual professionals • Policy influence: influenced the policies or activities of Member States • Sector influence: influenced the policies or activities of other stakeholders in the audiovisual sector • Symbolic: raised the profile of skill needs, skills, training and/or audiovisual professionals • Other (please state)	• To a great extent • To a moderate extent • To a small extent • Not at all • Don't know
39. To what extent have the Creative Europe Training Actions had the following overall impacts: • Contribution to cultural and linguistic diversity in Europe • Promotion of Europe's cultural heritage • Increased competitiveness of Europe's audiovisual sector	• To a great extent • To a moderate extent • To a small extent • Not at all • Don't know
40. Are any skills gaps not covered by the Creative Europe Training Actions? Please explain.	
41. How visible are the Creative Europe Training Actions amongst audiovisual professionals?	• Very visible • Fairly visible • Not visible • Don't know/too early to say
42. To what extent do the Creative Europe Training Actions complement the "Access to Market" activities supported	• To a great extent • To a moderate extent • To a small extent • Not at all

Question	Response
by Creative Europe: • Access to physical markets for European professionals • Online tools for professional • Common European promotional activities	• Don't know
43. Would you like to offer more comments about the relevance and effectiveness of the Creative Europe Training Actions?	
THANK YOU FOR YOUR PARTICIPATION IN THE SURVEY	

ANNEX TWO: INTERVIEWS UNDERTAKEN

Table A.1 Interviews undertaken (Wider stakeholders)

Stakeholder organisation
Creative Europe Desks
*European Audiovisual Observatory
AV Training Coalition
Groupement Européen des Ecoles de Cinéma et de Télévision (GEECT)
Universidade Lusofona
Danish Film School
SOFA School of Film Agents
European Broadcasting Union Academy
Film New Europe
Europa Distribution
Europa Cinemas
Europa International
International Video Federation
International Union of Cinemas
International Federation of Film Producers Associations
Society of Audiovisual Authors
CINEMATEK
International Federation of Film Distributors' Associations
Federation of European Film Directors
Swedish Games Industry
*European Co-ordination of Independent Producers (CEPI)
*Mediarte.be (Belgium)
*Creative Skillset (UK)
*Creative Skills Europe (European platform for employment and training in the audiovisual and live performance sector)

*Interview undertaken in order to inform the analysis of sector skill needs (Section 2)

Table A.2 Interviews undertaken (Participating organisations)

MEDIA Training Action
ACE
ANIDOXLAB
ATELIER_Femis
BERLINALE
CARTOON
Crossing Borders
Dok incubator
EAVE European Workshop Programmes
Ekran+
ENTER
Essential Legal Framework
Ex oriente Film programme
Inside Pictures

MEDIA Training Action
MAIA Workshops
SCREEN LEADERS
Sources 2
TorinoFilmLab
European TV Drama Series Lab
Midpoint (International Script Development Program)

ANNEX THREE: BIBLIOGRAPHY

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ANNEX FOUR: TERMS OF REFERENCE

1. OBJECTIVES OF THE STUDY

In order to help the creative sectors to fully exploit the opportunities offered by globalisation and the digital shift, the present study intends to identify the skills gaps within the European audiovisual industry and adjust the Training and Access to Market activities financed under the **Creative Europe MEDIA Programme**.

2. BACKGROUND

In recent years the EU policy context for culture has changed considerably. In 2007 the Commission adopted its first strategy for culture, "**The European Agenda for Culture**"[99] which was recognised at the highest level by the European Council in its conclusions of December 2007. The Agenda has three strategic objectives: (i) to promote cultural diversity and intercultural dialogue in line with Article 167 of the TFUE, (ii) to foster culture as a catalyst for jobs and growth, (iii) and to promote the vital role of culture in international relations.

Alongside this agenda, the cultural policy of the EU, as any other policy of the EU, has been aligned on the Europe 2020, the ten-year growth strategy for the EU adopted in 2010, which emphasises the importance of "creativity, innovation, and entrepreneurship".[100]

2.1 The Creative Europe Programme

In line with this overall policy framework, the European Parliament and the Council adopted on 13 December 2013 Regulation 1295/13 establishing the Creative Europe Programme (2014 to 2020).[101] This programme intends to help the cultural and creative sectors in achieving the following two general objectives:

– to safeguard, develop and promote European cultural and linguistic diversity and to promote Europe's cultural heritage;
– to strengthen the competitiveness of the European cultural and creative sectors, in particular of the audiovisual sector, with a view to promoting smart, sustainable and inclusive growth.

More specifically, the MEDIA Sub-programme of the Creative Europe Programme targets audiovisual players and focuses its support on either end of the value chain rather than on production, such that it is largely complementary to Member States' support and to EURIMAGES.

A core priority for the MEDIA Sub-programme in order to achieve the objectives of cultural diversity and competitiveness is to support the capacity of the European cultural and creative sector to operate transnationally and internationally.

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[99] http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2007:0242:FIN:EN:PDF
[100] COM/2010/2020 on a strategy for smart, sustainable and inclusive growth.
[101] Regulation No 1295/2013 establishing the Creative Europe Programme (2014 to 2020) and repealing Decisions No 1718/2006/EC, No 1855/2006/EC and No 1041/2009/EC.

2.2   Purpose of the study

The programme and its implementing measures will undergo a regular monitoring process in order to continuously adapt them to the evolving needs of the sector. This review will materialise by the end of 2017 with the mid-term evaluation report the Commission shall submit to the European Parliament and the Council as foreseen by Article 18 (3) and (4) of Regulation No 1295/13.

To prepare for this evaluation, the Commission needs a deep and up to date understanding of current actions supporting capacity building for professionals of the audiovisual industry. The Commission would also like to explore the links and synergies with Access to Market actions, as well as capacity building actions for professionals of other cultural and creative sectors as defined in Article 2 of the Creative Europe Programme Regulation[3].

Moreover, in all the areas covered, the Communication aims at improving the complementarity between Member States and Commission policies. It promotes common directions in the way to better embrace the possibilities and address challenges related to the digital shift while taking account of cultural and linguistic diversity and the varieties of the national audiovisual landscapes, stressing the need for a joint effort to strengthen the global efficiency of existing funding tools for the competitiveness and diversity of the European film sector.

As an operational recommendation, the Commission has called for the launch of a European film forum, a process building on existing instruments, aiming at promoting the exchange of experience and practices, and the studying and sharing of knowledge on issues of common interest for the EU and the Member States such as the complementarity between EU and national interventions. The outcome of the study shall contribute to this process.

2.3   The Training action line

Within the field of reinforcing the audiovisual sector's capacity, one of the priorities of the Creative Europe MEDIA Sub-programme is to facilitate the acquisition and improvement of skills and competences of audiovisual professionals and the development of networks. These skills include financial management and the use of digital technologies to ensure the adaptation to market development, testing new approaches to audience development and testing of new business models.

To that end, the programme provides support for the development of a comprehensive range of training measures promoting the acquisition and improvement of skills and competences by audiovisual professionals, knowledge sharing and networking initiatives, including the integration of digital technologies, innovative business models and financing.

In particular, these measures aim at

–   facilitating the learning and acquisition of new skills and expertise; knowledge sharing from peers and senior professionals, and best practices dissemination among participating professionals,

–   enabling access to international professional markets, developing business models and strengthening international businesses and cooperation in the audiovisual sector.

These measures cover both

–   European actions aimed at the acquisition and improvement of skills and competences for professionals to operate mainly in Europe

– International actions aimed at building expertise, knowledge and capacities for European professionals to peer, network and collaborate with non-European professionals to enable access to international professional networks

The programme foresees that these measures may take the form of workshops and/or on-line coaching sessions and dissemination tools by using proven or testing new learning, teaching and coaching methods and best practice dissemination.

2.4 The Access to Market Action line

Within the specific objective of reinforcing the audiovisual sector's capacity to operate transnationally, the priorities of the Creative Europe MEDIA sub-programme are to:

– increase the capacity of audiovisual operators to develop audiovisual works with a potential to circulate in Europe and beyond and to facilitate European and international co-productions including with television broadcasters;

– encourage business to business exchanges by facilitating access to markets and business tools for audiovisual operators to increase the visibility of their projects and works on European and international markets.

To that end, the programme provides support for

– facilitating access to professional audiovisual trade events and markets and the use of online business tools inside and outside the Union;

– facilitating circulation of European films worldwide and of international films in the Union on all distribution platforms, via international cooperation projects in the audiovisual sector.

The MEDIA Sub-programme encourages Access to Markets actions taking place in and outside countries participating in the MEDIA Sub-programme and having as expected results and impact:

– the improvement of the European/international dimension and effectiveness of existing large industry markets and to increase the systemic impact of smaller initiatives;

– an increase in the visibility of professionals and audiovisual works from European countries with a low production capacity;

– an increase in the number of European co-productions and a greater diversification of talents and sources of funding;

– the improvement of the competitiveness and circulation of European audiovisual works on international markets.

3. SCOPE OF THE STUDY

The study will address Training and Access to Market activities carried out in the context of the Creative Europe Programme MEDIA Strand (2014-2020) and will cover all the territories participating in the Programme.

4. SPECIFIC OBJECTIVES OF THE STUDY

(i) The main focus of the study is to identify the skills needed in the audiovisual industry to fulfil the objectives of the **Creative Europe Training action line** as described in point 2.3 above, and to fully exploit the opportunities offered by the globalisation and digital shift of the sector.

In that context, the main objectives are to (a) identify skills gaps in the sector (b) evaluate the relevance, efficiency and effectiveness of the current Training

activities of the Programme to contribute to closing these gaps and (c) formulate recommendations.

(ii) The study will then explore the potential synergies between Training and **Access to Market actions** under the Creative Europe Programme, especially in the context of activities organised by bodies providing both.

(iii) With a wider perspective of the Creative Europe Programme, the study will identify potential bridges and cross-over opportunities between Training activities in the audiovisual sector with other sectors of the **Cultural and Creative industries** as defined in Article 2 of the Creative Europe Programme Regulation.[102]

5. PROPOSED APPROACH AND TASKS

This section provides overall guidelines on the methodological approach to be followed. **Framework contractors are expected to refine it and lay out their proposed methodology in their offer.**

The tasks of the contractor are to collect, analyse, judge and present primary and secondary data that address the issues of the study and answer the questions laid down in the present document, as well as to formulate conclusions and recommendations in relation to the purpose of the study.

5.1 Proposed Approach

Data collection

Some information sources will be provided by the Commission such as previous studies, evaluation reports, impact assessments, as well as other external sources. A complete list of available reports will be provided to the contractor. The Commission will also provide a comprehensive set of data regarding the activities currently carried out under the Creative Europe Programme relevant action lines.

Desk research will cover Commission previous reports and studies on related subjects and any relevant published source identified by the contractor.

A **survey** of professionals of the sectors and territories covered by the Creative Europe Programme will be carried out to feed into tasks described 5.2 below. The target group should include beneficiaries of the Programme, applicants thereof, providers and participants to training activities, employers, public and private financiers in the fields covered by the Programme, as well as any other stakeholders as deemed relevant by the contractor in the context of the objectives of the study.

The contractor will identify together with the Commission and the Executive Agency for Culture, Education and Audiovisual implementing the programme key stakeholders to be **interviewed** and propose an interview guide.

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[102] The Cultural and Creative industries "include inter-alia architecture, archives, libraries and museums, artistic crafts, audiovisual (including film, television, video games and multimedia), tangible and non-tangible cultural heritage, design, festivals, music, literature, performing arts, publishing, radio and visual arts".

The framework contractor will propose in his offer any other data collection tools deemed appropriate in this context, such as workshops, focus groups, etc. and estimated costs associated.

Data analysis

The study should be guided by the data and information gathered during the data collection phase. The framework contractor will present factually-based findings and recommendations and provide information as to whether these are based on opinion, analysis or objectively verifiable evidence. Where opinion is the main source, the degree of consensus and the steps taken to test the opinion should be given.

The rationale for the processing and extraction of data from quantitative sources must be comprehensively documented. Both the full set of data and the full sets of results tables must be made available, on request, to the European Commission.

5.2 Tasks

In order to fulfil the objectives of the study, the contractor will carry out the following tasks. Any additional task deemed relevant can be described in the contractor's offer.

5.2.1 Training activities

(a) Provide a Mapping of the current Training actions in terms of topic taught and geographical area in view of evaluating their consistency and coverage (data will be provided by the Commission).

(b) Analyse specifically current training activities with non-EU international dimension.

(c) Evaluate the benefits of training courses in terms of capacity building, networking, etc.

(d) Estimate the cost of existing Training programmes per day and per participant (raw data will be provided by the Commission)

(e) Identify the skills needed for a successful European audiovisual industry in view of current and future challenges

(f) Compare the topics covered by the current training activities to those laid down in the guidelines[103] of the Training action line

- Training in audience development, marketing, new modes of distribution and exploitation using the latest digital technologies including social media;

- Training in financial and commercial management with a view to stimulate access to finance and new business models;

- Training in development and production of audiovisual works including knowledge sharing and networking capabilities;

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[103] http://ec.europa.eu/culture/calls/index_en.htm

– Training in facing the challenges of the digital shift to ensure adaptation to market developments.

(g) Compare the topics covered by the current training activities with the needs identified in (e) above and comment on the balanced nature of the programme selection with regards to these needs.

(h) Estimate the relevance and European added-value of teaching these topics with regards to the overall and specific objectives of the Creative Europe Programme

(i) Estimate relevance, efficiency and effectiveness of current teaching methods

– Identify opportunities for dissemination of results and opening up of audience via distribution of course material, online platforms, etc.

– Identify room for improvement in terms of the delivery of training courses: format, audience, pedagogical methods

(j) Identify potential bridges and cross-over opportunities between the audiovisual sector and other sectors as defined in Article 2 of the Creative Europe Programme Regulation[3]

(k) Research best practice outside of the EU

5.2.2 Cross-analysis of Training and Access to Market activities

(l) Evaluate the contribution of Access to Market activities to the skills needs identified in (e) above (skills needed for a successful European audiovisual industry in view of current and future challenges)

(m) Explore the synergies between **Training** and **Access to Market actions** under the Creative Europe Programme. If appropriate, make further suggestions for the exploitation of synergies between projects both within the current Training offer and within the Training & Access to Markets activities.

(n) Evaluate the benefits of holding both Training and Access to Market activities at the same place and time in terms of efficiency and complementarity

(o) Analyse specifically the activities organised by beneficiaries who provide both Training and Access to Market actions (ex: Cartoon, Power-to-the-Pixel)

6. DURATION

Duration of the tasks must not exceed 9 months and is subject to the provisions of Article I.2.3 and I.2.4 of the framework contract.

7. MEETINGS, DELIVERABLES AND REPORTING REQUIREMENTS

Each report will be submitted electronically in English. The Commission will comment on all reports within 30 days. In the absence of observations from the Commission within the deadline, the report will be considered as being approved.

Within 14 days of receiving the Commission's observations, the Contractor will submit the report in definitive form, taking full account of these observations, either by following them precisely, or by explaining clearly why they were not followed. Should the Commission still not consider the report acceptable, the Contractor will be invited to amend the report until Commission's approval.

–   Within **2 weeks** after the signature of the contract, a **kick-off meeting** between the Contractor and the Commission will be held in Brussels.

–   Within **8 weeks** after the signature of the contract, an **Inception report** will be delivered. It will specify the work programme for the study and describe, in relation with the initial specific offer, the methodological and empirical approaches to be used for the tasks defined in the present terms of reference. It will also include a detailed work plan and methodology for the field work and data collection, and proposed structures for the comparative analysis, as well as proposed lists of contacts to be surveyed, interviewed or invited to a workshop.

The inception report will be submitted to the steering group composed of officials of the European Commission and of the Education, Audiovisual and Culture Executive Agency in charge of the Creative Europe Programme. The report will also identify any additional need for information to be collected during the study. It will take the form of a draft document to be discussed with the steering group during the **inception meeting** to be held at the Commission's premises in Brussels within **10 weeks** after signature of the specific contract by the last contracting party.

The report should be finalised after the meeting taking into account all observations and comments raised at the meeting. The Inception report shall be made available within 2 weeks after the inception meeting.

–   Within **4 months** after the signature of the contract, an **Interim Study Report** will be delivered towards the end of the data collection phase. It will demonstrate how the existing data has been catered, what preliminary results have been drawn from the desk research phase. It will summarise progress made on all the tasks to be executed during the contract and raise any problems encountered. It will indicate how the framework contractor is proceeding to collect any additional data that may be required to carry out the data analysis.

The report will take the form of a draft document to be discussed with the steering group during the **interim meeting**. This report will also include the proposed structure of the **Final Study Report** as well as a **progress report** on resource consumption, time-sheets on man-days consumption, travel details and costs of any specific activity organised by the contractor.

–   Within **7 months** after the signature of the contract, a **Draft Final Study Report** will be submitted to the Commission. This document will follow the structure of the Final Study Report as agreed after the previous Meeting and will include preliminary conclusions and recommendations. The steering group will provide comments on the report during a **final meeting** to be held within 2 weeks of reception in the Commission's premises in Brussels.

–   Within **8 months** after the signature of the contract, the **Final Study Report** will be delivered to the Commission, taking account of the comments made by the steering group on the Draft Final Study Report. It will cover all points of the work plan and shall include sound analysis of findings and factually based conclusions and recommendations, in line with the purpose and objectives of the study.

–   The **Final Study Report** will be written in English or French, of publishable quality and delivered both in paper (5 copies) and electronic form. It will include an **Executive summary** (approximately 10 pages long) and will be provided in both English **and** French.

– The Commission services will decide about the possible dissemination of the findings and conclusions and any other information produced under this assignment.

In parallel with these milestones, the Contractor shall take particular attention to ensure an on-going dialog with the Commission throughout the duration of the assignment.

8. AWARD CRITERIA

In accordance with the indications of Annex II to the Tender Specifications of the framework contract the evaluation committee will evaluate the tenders and select the actual Contractor based on the following award criteria, each of which is weighted as shown below.

Quality criteria

N°	Qualitative Award criteria	Weighting (max. points)
1.	Knowledge and **understanding** of the subject and its context, and of the purpose and requirements of the tasks to be performed	**30**
2.	Relevance, feasibility and credibility of the approach proposed for the **management** of the work, including work plan and timetable, resource allocation, composition of the team of experts and quality assurance	**30**
3.	Quality and relevance of the **methodologies** and tools proposed	**40**
Total points		**100**

Offers for which the technical quality assessment score of one (or more) of the quality criteria is less than 50% of the maximum points assigned to that specific criterion will not be considered for the price assessment and for the award of the contract.

Offers for which the overall technical quality assessment score is less than 65 points will not be considered for the price assessment and for the award of the contract.

Financial criteria

Each offer will be assessed in terms of the total price on the basis of the unit prices set in the Framework Contract, broken down by categories of experts.

9. AWARD OF SPECIFIC CONTRACT

The contract will be awarded to the bid offering the best value for money, taking into account the quality of services by weighing technical quality against price on a 70/30 basis. This is done by multiplying:

- the scores awarded for the technical quality by 0.70;

- the scores awarded for the financial bid by 0.30.

The technical and financial scores multiplied by the weighting factors are then added together, and the contract is awarded to the tender achieving the highest score.

10. TENDER PRICE

The maximum price for the services to be provided under the specific contract is **EUR 125 000 (one hundred twenty five thousand euro).** Offers above that amount will not be considered for evaluation.

A total fixed price expressed in EUR shall be included in the offer in accordance with point 3.5 of the Tender Specifications of the Framework Contract.

The contract prices shall be firm and not subject to revision.

The price offer for the specific contract will be determined by the unit prices for professional fees as set out in the Price Form (Annex 4) submitted with the tender for the framework contract and annexed to the Framework Contract (see Section 3.5.2 of the Tender Specifications of the Framework Contract).

The type of costs included in the price offer must fall within the scope of the specific request for services and terms of reference.

European Commission

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Luxembourg, Publications Office of the European Union