

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

EXECUTIVE SUMMARY

A study prepared for the European Commission

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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 skill-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 some/all Training Action funds into “MEDIA scholarships”, enabling professionals 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 coordinators 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. If the "demand-driven" model is adopted, this would involve the creation of "MEDIA scholarships" for audiovisual professionals.
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 "MEDIA scholarships" (if such scholarships are created as part of the "demand-driven" model).
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.

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