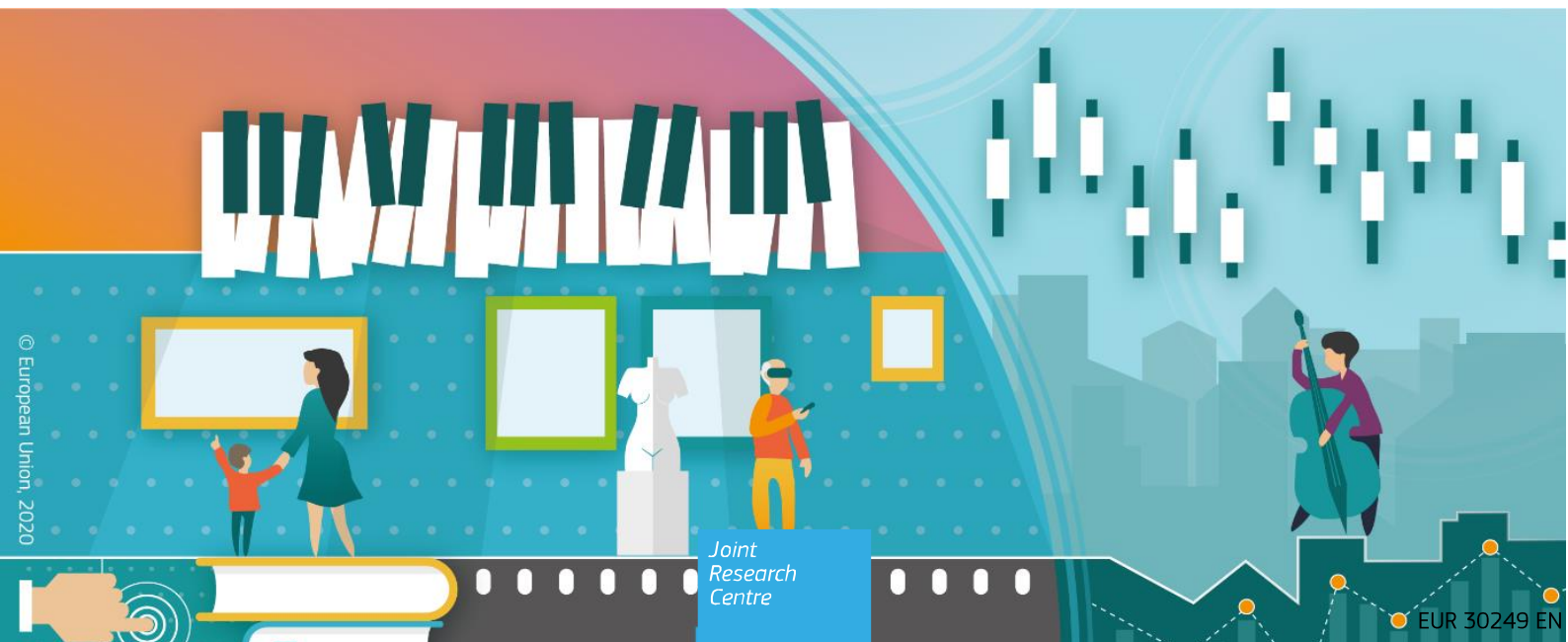


JRC SCIENCE FOR POLICY REPORT

European Cultural and Creative Cities in COVID-19 times Jobs at risk and the policy response

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Abstract

Empty cultural places, drastically reduced mobility and tourism blockade as an effect of COVID-19 confinement measures not only generate an evident economic damage to cultural institutions, companies and workers but also create a strong economic and social discomfort at city level. Although many EU member states are now entering into a de-confinement phase, many cultural places remain closed or subject to stringent physical-distancing measures. In these new circumstances, one main condition for the sustainability of most cultural and creative sectors (CCS) has been almost entirely disrupted: the possibility to have a public 'live' as a source of revenues to meet operating costs, putting more than seven million jobs at risk in Europe. Using cultural jobs statistics from Eurostat and the JRC's Cultural and Creative Cities Monitor, this report identifies highly vulnerable cultural jobs and creative cities. Despite the unprecedented challenges raised by the COVID-19 pandemic, some cities are already experimenting new event formats to better reach local inhabitants and nearby communities, while ensuring the financial sustainability of cultural activities. Both national and city governments have issued a wide range of policy measures (from compensatory grants to tax reliefs) to maintain alive Europe's cultural capital, while giving cultural institutions, companies and workers the time to get prepared to post-COVID times. Proximity tourism could indeed help compensate losses from international tourism, while new cultural services that meet societal needs (educational, health, environmental...) would help restore the European social fabric and people's well-being.

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The present report has benefitted for the valuable comments provided by European Commission's colleagues from the Directorate-General for Education, Youth, Sport and Culture (DG EAC) and Eurostat (DG ESTAT). Our special thanks go to Barbara STACHER, Elisa GRAFULLA, Inna GARKOVA, Maciej HOFMAN and Vyzika MELPOMENI (DG EAC) and Marta BECK-DOMZALSKA (DG ESTAT).

Executive summary

Empty cultural places, drastically reduced mobility and tourism blockade with impacts in the coming months as a consequence of COVID-19 confinement measures not only generate an evident economic damage to cultural institutions, companies and workers but also create a strong economic and social discomfort at city level. Even now that the pandemic peak is over, many cultural and creative organisations remain subject to severe physical-distancing requirements. Since the 80s, local authorities have strived to nurture and harness the creative potential typical of cultural and creative sectors (CCS) in the global race to attract residents, talents, visitors, investments and businesses. In Europe alone, the European Commission estimates that at least 190 cities in 30 different countries have committed to invest in culture to support culture-led development strategies (Montalto et al., 2019).

With the coronavirus pandemic, one main condition for the sustainability of most cultural and creative sectors (CCS) has been almost entirely disrupted: the possibility to have a public in presence as a source of revenue to meet operating costs, putting more than seven million jobs at risk. Finding new and financially sustainable ways to keep CCS working is crucial to fully realise the New European Agenda for Culture's mission to *'do more, through culture and education, to build cohesive societies and offer a vision of an attractive European Union'* as well as *'help build a more inclusive and fairer Union, supporting innovation, creativity and sustainable jobs and growth.'* (p. 2). CCS can contribute to Sustainable Development Goals (SDGs) in many ways: they can help re-think the scope and meaning of public spaces, contribute to bridge cultural poverty gaps, promote new knowledge-based models of economic growth and employment, and mend social fractures by bringing new projects and energies in left-behind territories. Supporting sustainable development through culture is another major objective of the New Agenda.

But how is the pandemic actually affecting CCS? In particular, how many workers are we talking about? What are the most vulnerable sectors or areas in Europe? And what can we learn from the impact of COVID-19 on CCS for future policies?

Using data from Eurostat's EU-Labour Force Survey and the JRC's Cultural and Creative Cities Monitor benchmarking tool¹, this report finds that:

- Cultural jobs are particularly at risk because of the sector's high level of structural fragmentation as well as its reliance upon live events and institutions open to the public. Such activities have been mandatorily cancelled/closed to the public in many EU countries. In addition to that, cultural workers are at risk of major income losses because they may fall through the cracks of existing social protection systems more than other types of workers: in the 27 EU member states, on average, 32% of them are self-employed, compared to 14% in overall employment. The percentage of self-employed is even much higher among artists and writers (44%). Non-standard workers such as the self-employed are not only at higher risk of losing their job and/or income, but are also likely to have no alternative sources of income or medical insurances;
- European medium-sized cities that are highly 'arts-jobs intensive' are particularly vulnerable to the COVID-19 shock due to: (i) the strong links of arts and culture with many other sectors such as tourism, food and transport, and (ii) their smaller and less diversified job markets compared to larger cities. However, some of them are showing a good degree of resilience and capacity to bounce back: local cultural institutions are already re-thinking their mission, for instance transforming their exhibition spaces into production centres for artists, or developing ecological and health safety-compliant event formats and (digital) business models;
- European medium-sized cities with a high share of tourism jobs (between 30 and 50% of local jobs) are particularly exposed to the reduction of mobility; despite their vulnerability, however, their strong cultural and tourism infrastructure may support the re-organisation of the local offer towards a more regional / local market, which is why some cities have already started to design travel campaigns to boost domestic tourism. Local visitors help compensate losses from international tourism;
- Most national governments have promptly reacted to ensure support of cultural institutions and companies and preserve cultural jobs. Four main typologies of policy measures have been adopted: (i) payment of grants already allocated despite the closure of cultural institutions and the cancellation or postponement of events; (ii) indirect financial support measures, such as tax and VAT reliefs; (iii) financial measures to compensate for income losses; (iv) and other forms of support such as advisory services.

¹ <https://composite-indicators.jrc.ec.europa.eu/cultural-creative-cities-monitor/cultural-creative-cities>

- Complementary policy support measures have also been adopted at city level. Cities particularly stand out for their ability to initiate or support innovative, bottom-up actions that are boosting the uptake of digital culture or facilitating the development of new event formats. For instance, many cities have promoted digital culture initiatives through dedicated web pages, organised open air concerts and shows that people can safely watch from home, either online or from their balconies, or offered emotional and material help to socially vulnerable groups, for instance through book readings over the phone.
- While cities of all sizes have proposed policy responses to support CCS during the coronavirus crisis, it is mostly capital cities that have adopted large-scale support plans. Future national and European policies will have to address the possibly magnified inequalities caused by the pandemic and enlarged gaps between cultural powerhouses and smaller arts cities.

As part of the JRC's efforts to monitor the effects of COVID-19, the third edition of the Cultural and Creative Cities Monitor is currently being reshaped with a view to reflect impacts on CCS as anticipated in this report. The future edition will in particular verify potential impacts vis-à-vis updated Eurostat's city statistics and present a more in-depth analysis of sectoral transformations and (novel) structural policies put in place. To this aim, in the coming months the Cultural and Creative Cities Monitor's online tool will already make available a new policy section as a result of a city survey launched last April. The survey gathered inputs on initial impacts, experimental initiatives and policy support measures from over 60 cities in 23 European countries, partly integrated in this report. The full third edition of the Monitor, including a new policy report and updated online tool, is expected to be released in the first quarter of 2022.

1 Introduction

With the spreading of COVID-19, the art and culture sectors have suffered a wave of cancellations and postponements, putting more than seven million jobs at risk in Europe. Concerts, stage performances and cultural festivals of all genres have been reprogrammed or even definitively cancelled, while bookstores, theatres, museums, cultural heritage sites, art galleries and cinemas have been forced to close their doors to the public. Some of them remain closed even if confinement measures are now being lifted in many EU member states. If allowed to open, a number of health security measures have to be observed, which usually include severe limitations to the number of visitors and often put into question the economic sustainability of keeping spaces open at all. Along with the tourism sector, the cultural sectors are thus among the most affected ones by the pandemic, with individual artists and creatives struggling for professional survival.

The COVID-19 pandemic and the subsequent physical distancing measures seriously question the sustainability of cultural institutions and enterprises for the foreseeable future. Among others, one basic dimension of the functioning of many activities of the cultural and creative sectors (CCS) has been almost entirely disrupted: the possibility to have a public in presence as a source of revenues to meet operating costs. All this falls on a sector already structurally fragmented due to the very high number of SMEs and micro-companies, as well as of freelancers and atypical non-standard workers.

The closing down of cultural spaces and the drastic reduction of mobility and tourism flows as an effect of COVID-19 containment measures will leave a deep mark, generating not only major economic damage to cultural institutions and companies, but also causing serious, widespread economic and social distress, mostly at city level. Local authorities have long strived to nurture and harness the creative potential typical of CCS in the global race to attract residents, talents, visitors, investments and businesses. Since the 80s, culture has been increasingly recognised as a major resource for urban flourishing and regeneration. Many different cities have thus put culture at the very core of their development strategies to serve policy objectives in a wide range of areas, ranging from social cohesion to economic innovation and job creation (e.g. Evans & Foord, 2006; Flew, 2010; Landry & Bianchini, 1995; Miles, 2006; Ponzini & Rossi, 2010; Prior & Blessi, 2012; Scott, 2010). In Europe alone, the Joint Research Centre (JRC) – the science and knowledge service of the European Commission – estimates that at least 190 cities in 30 countries have committed to invest in culture to support urban regeneration (Montalto, Tacao Moura, Alberti, et al., 2019).

While facing the disruptions caused by the pandemic, many cultural institutions have stood up to the challenge of staying connected to their audiences through an immediate, timely adaptation, leveraging upon an intensive recourse to digital channels and platforms – as a new basis for safe, culture-driven social interactions. As a result, we are witnessing an unprecedented surge of online creativity and a deluge of digital content covering all sorts of heritage- and art-related topics where users are often invited to take an active role in unusual and engaging ways, for instance by recreating famous artworks as do-it-yourself home performances. The European Commission has asked beneficiaries of the Creative Europe Programme to showcase their activities under the common hashtag #CreativeEuropeAtHome, and launched the EUCultureFromHome² social media campaign to collect cultural initiatives accessible online in the open source web app Cultural gems³ (see also Box 3).

One must however observe that despite digital content is generally available for free (thus striking another blow to the financial sustainability of cultural professionals and institutions) or widely distributed through major streaming platforms, it cannot be considered as a perfect replacement of the live experience: local space and physical encounters are what brings communities together. These new circumstances call for strategic development and investment in sustainable business models for CCS to survive, leveraging upon a strengthened, more inclusive digital infrastructure to improve access and overcome digital inequalities. Investments in new skills to develop novel formats and content to reach out to new audiences, both online and offline, in spite of the limitations posed by physical distancing measures, are also needed.

The active contribution of CCS is critically important to develop more resilient post-COVID-19 societies. CCS can help re-think the scope and meaning of open public spaces for safe, resilient and sustainable cities, contribute to bridge educational poverty gaps through the development of new alliances with the educational sector, promote new models of knowledge-intensive economic growth and employment, and mend social fractures bringing new projects and energies into left-behind territories, to name just a few examples of ways through which cultural institutions, companies and professionals can help meet Sustainable Development Goals (SDGs). Helping implement the UN 2030 Agenda for Sustainable Development is a main objective of the New European Agenda for Culture, which has the overall purpose to *'do more, through culture and education, to build cohesive*

² https://ec.europa.eu/programmes/creative-europe/content/share-your-art-home_en

³ <https://culturalgems.jrc.ec.europa.eu/>

societies and offer a vision of an attractive European Union [...] and 'help build a more inclusive and fairer Union, supporting innovation, creativity and sustainable jobs and growth.' (p. 2).

But how is the pandemic actually affecting CCS? In particular, how many workers are we talking about? What are the most vulnerable sectors or areas in Europe? What can be done to maintain the sector alive? And what can we learn from the impact of COVID-19 on CCS for future policies?

Using Eurostat's EU-Labour Force Survey (LFS) data, this report offers an overview of the cultural employment conditions in EU-27 countries highlighting those employment categories and countries where cultural workers may be particularly at risk (Section 2.1). It then mobilises the JRC 'Cultural and Creative Cities Monitor' for a more in-depth analysis. We thus identify different typologies of cities and degrees of vulnerability based on their local art and tourism job intensity indicators (Section 2.2). The report finally presents the main typologies of culture-specific policy measures adopted at national and local levels to counter the socio-economic effects of the pandemic, including some illustrative cases (Section 3). Examples also embrace forward-looking initiatives through which cultural institutions and companies are re-shaping their tasks or spaces to maintain their cultural mission while adapting to a rapidly changing world.

2 Europe’s culture in COVID-19 times: what is at stake?

2.1 The national perspective: cultural jobs in EU-27

Due to the multifaceted and highly fragmented nature of the so called CCS⁴, it is not easy to get a precise estimate of the potential impacts and losses of CCS due to the COVID-19 pandemic, but data on cultural employment⁵ in Europe offer insights about particularly vulnerable jobs. According to Eurostat’s EU-Labour Force Survey, art and culture amount, on average, to 3.7% of total employment in the 27 member states of the European Union, with values well above the EU average for countries such as Estonia (5.6%), Luxembourg (5.3%), Malta (5.2%), Finland (4.9%), Slovenia (4.7%), Sweden (4.6%) and the Netherlands (4.6%).

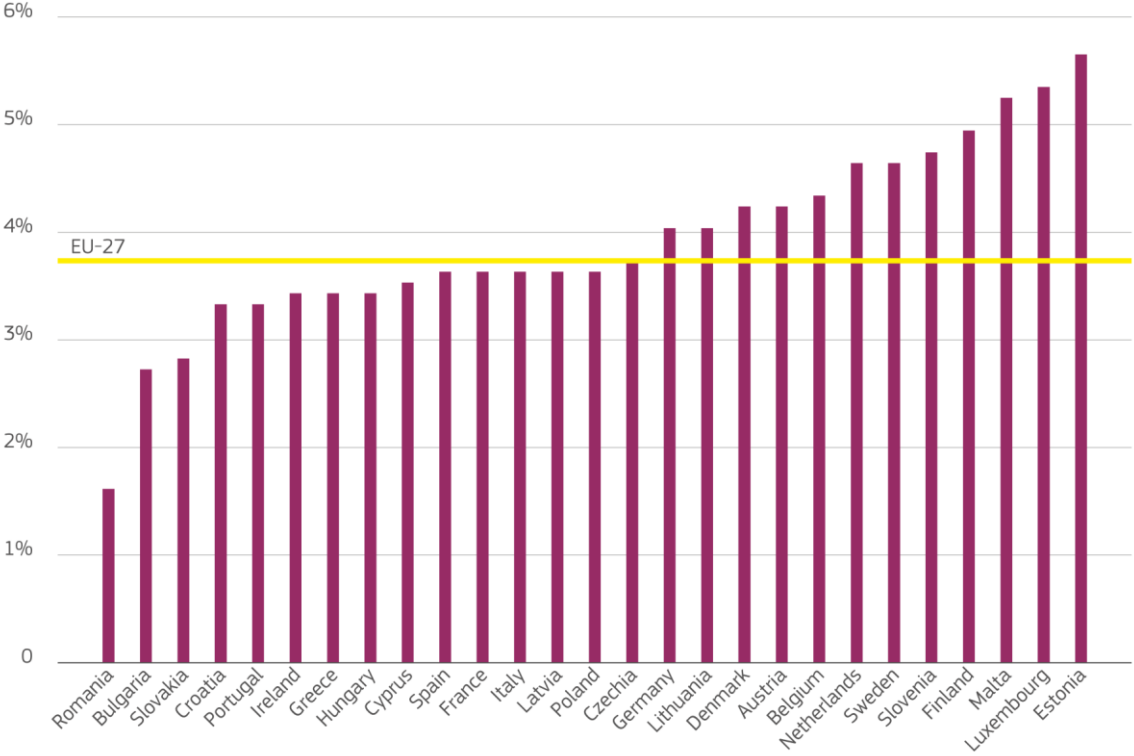


Figure 1. Cultural employment as a percentage of total employment.

Source: European Commission, Joint Research Centre, based on 2018 data from Eurostat (online data code: cult_emp_sex)

Nevertheless, survey data as the ones presented here are likely to underestimate the weight of art and culture in employment as much cultural work remains in many ways invisible: the life of a few known institutions or companies depends, in fact, on the contribution of many workers who stand ‘off the radar’⁶. The economic

⁴ Among the most recent studies on the topic see, for instance, (KEA & PPMI, 2019).
⁵ According to Eurostat’s definition, cultural employment includes individuals with a cultural occupation working in or outside the cultural sector (for example a dancer employed by a ballet company, or a designer in the automotive industry) as well as people with a non-cultural occupation in the cultural sector (for example, the accountant in a publishing house). See Annex 1 for more details.
⁶ From a statistical viewpoint, this means that Eurostat’s data on cultural employment consider only the respondent’s main job and therefore omits information pertaining on workers holding a second job in the cultural field. Also, some cultural activities and occupations escape from the count, as they cannot always be distinguished from broader economic or occupational categories which are not included in Eurostat’s culture definition. For example, sports, recreation and cultural center managers (ISCO 1431) refers to an occupation with a cultural component. However, it is impossible to estimate the share specifically relating to culture. As such, and taking a conservative approach, Eurostat decided to exclude this occupation (and other similar cases) when computing an aggregate for cultural employment. For a critical analysis of the current data and knowledge in relation to the creative and cultural workforce, see also Dent et al. (2020).

consequences of closures and cancellations that have affected places of art and culture institutions and venues will therefore go far beyond the single cinema, museum or theatre. Artists, authors, directors, mediators, curators, cultural heritage operators, museum guides, designers are mere examples of the variety of professionals that make such institutions work, and who not only risk of losing their job, but cannot even count upon any form of income support or sickness benefit schemes, as they are mostly self-employed and relying on month-to-month paychecks and earning flows. Social protection generally works well for employees with stable occupations and significant work experience and career development, whereas those with unstable occupations, or limited experience and career history, as well as the self-employed and other atypical workers often remain unprotected, or poorly protected. For cultural employment, the percentage of self-employed workers is considerably higher (32%) than in the whole economy (14%), and this difference has remained almost stable over time.



Figure 2. Self-employed persons in cultural employment and in total employment, EU-27, in %.

Source: European Commission, Joint Research Centre, based on 2018 data from Eurostat (online data code: cult_emp_wsta).

A simple average, however, can conceal large differences. If we look more specifically at artists and writers⁷ - the only cultural occupational category for which Eurostat offers us more detailed information - the share of self-employed workers rises to 44% in the EU-27, forcefully illustrating how entire cultural and creative sub-sectors largely consist of professional profiles whose income flows are highly uncertain and atypical. Writers and artists are often not covered by long-term contracts with publishers or galleries, and need to place their creative output at every round of their creative process, while facing substantial uncertainty about its time of

⁷ This includes two specific cultural occupations: creative and performing artists (including visual artists, musicians, dancers, actors, film directors, and so on) and authors, journalists and linguists. As suggested by Eurostat, these two groups of occupations are here referred to as 'artists and writers'.

completion and quality. They are therefore potentially more at risk in difficult circumstances when the art and publishing markets are on the brink of collapse.

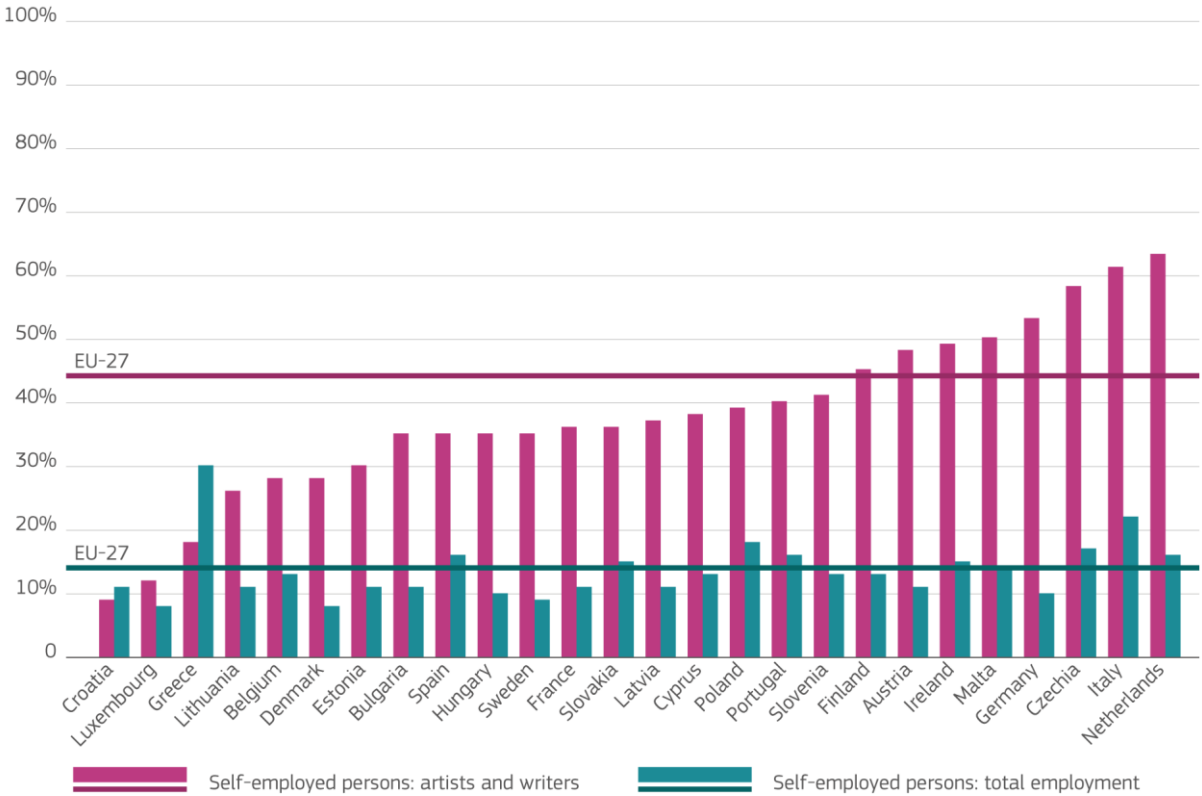


Figure 3. Self-employed persons among artists and writers and in total employment.

Source: European Commission, Joint Research Centre, based on 2018 data from Eurostat (online data code: cult_emp_artpc). No data available on artists and writers for Romania.

In some countries such as the Netherlands, Italy, Czechia and Germany, independent work characterises more than 50% of persons having their main job as artists or writers. Only in six countries - Denmark, Belgium, Lithuania, Greece, Luxembourg and Croatia - self-employment among artists and writers represents less than 30%. Greece, on the other hand, is the only EU country in which the share of self-employment in the total working population (30%, the highest in Europe) is higher than that recorded for artists and writers (18%) (Figure 3). However, Greece is also one of the countries where culture contributes less than the European average to total employment (3.4%).

2.2 The city perspective: insights from the Cultural and Creative Cities Monitor

While national data help set the context, they bear the risk to offer a misleading picture in countries and sectors with significant territorial disparities. Sub-national data and insight provide a more detailed picture that is necessary to develop evidence-based policies, especially in sectors highly affected by the pandemic.

As culture is now widely recognised as a major resource for urban flourishing and regeneration, and finds a place at the very core of many European cities’ development strategies, it is relevant to ask: how is the COVID-19 pandemic impacting jobs in cities that have committed to invest in culture-led development?

Broadly speaking, this crisis severely hits sectors whose typical functioning counts on travelling and physical presence. Regardless of the containment measures put in place by the various national governments, data from smartphone localisation collected by Apple in fact shows that between mid-March and early May mobility has dramatically decreased in a high majority of cities.

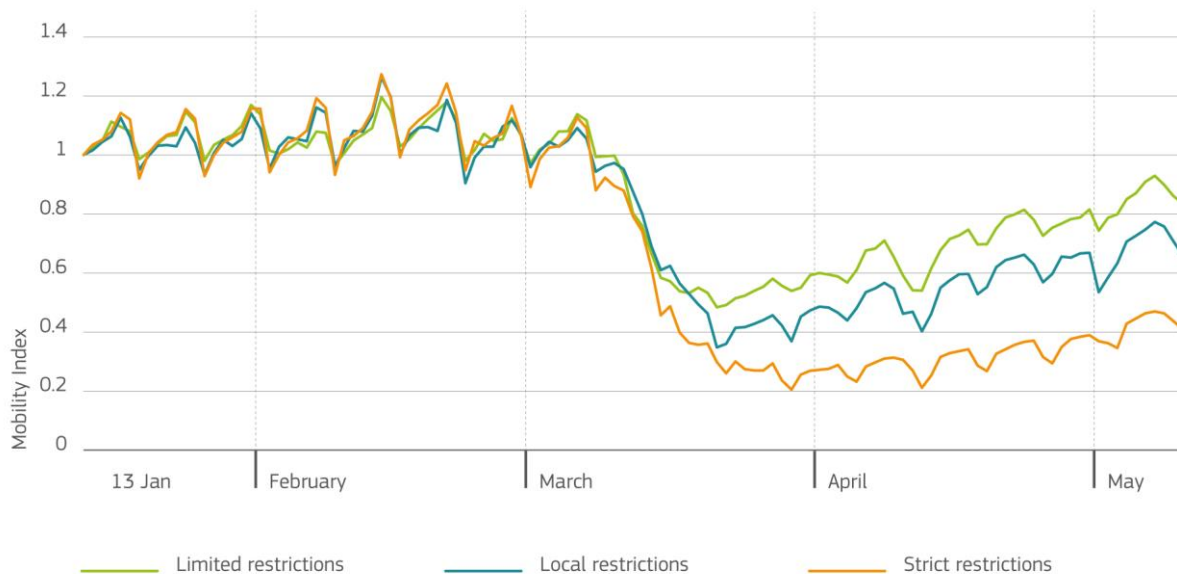


Figure 4. Mobility index score

Source: JRC graph elaborated on Apple Mobility Trends Reports available at www.apple.com/covid19/mobility

Note: average of the driving mobility index at different points in time, based on 32 EU cities for which Apple data on mobility are available. The classification of restrictions is based on the OECD elaboration of government responses data from the Blavatnik School of Government (<https://www.bsg.ox.ac.uk/research/publications/variation-government-responses-covid-19>).

Sectors requiring travelling and physical presence certainly include CCS. Cities relying on these sectors are therefore going to be particularly exposed to the economic effects of the pandemic. In addition to that, effects are going to extend to all sectors that present significant complementarities with the CCS' value chains and that need physical presence as well, among which restaurants and bars, transport and, clearly, tourism.

To investigate more closely the share of jobs at risk, we have selected the Top 30% Cultural and Creative Cities, meaning the 50 cities in EU-27 countries with the highest score on the Cultural and Creative Cities (C3) Index of the Cultural and Creative Cities Monitor.

Box 1. What is the Cultural and Creative Cities Monitor?

Launched in July 2017, the Cultural and Creative Cities Monitor is a novel benchmarking tool designed and developed by the Joint Research Centre of the European Commission. It consists of an interactive online tool⁸ and a number of accompanying policy and technical documents and infographics that illustrate the methodology and key findings⁹. Its aim is to monitor and assess the relative performance of 'Cultural and Creative Cities' in Europe that have similar population, income and employment levels, using both quantitative indicators and qualitative information.

The 2019 edition – which is one of the 65 actions proposed by the European Framework for Action on Cultural Heritage¹⁰ – presents an updated portrait of the cultural and creative resources in an enriched sample of 190 cities in 30 European countries (the EU-27 plus Norway, Switzerland and UK). They were selected on the basis of their proven engagement in the promotion of culture and creativity – thus, being included in the Monitor is in itself an acknowledgement of these cities' efforts in this domain.

The Monitor's quantitative information is captured through **29 indicators** that cover nine policy dimensions reflecting three major facets of a city's cultural and socio-economic vitality:

- **Cultural Vibrancy** measures a city's cultural 'pulse' in terms of cultural infrastructure and participation in culture;

⁸ <https://composite-indicators.jrc.ec.europa.eu/cultural-creative-cities-monitor/cultural-creative-cities>
⁹ All documents and raw data are fully accessible at this link: <https://composite-indicators.jrc.ec.europa.eu/cultural-creative-cities-monitor/docs-and-data>
¹⁰ https://ec.europa.eu/culture/content/european-framework-action-cultural-heritage_en

- **Creative Economy** captures the extent to which the cultural and creative sectors contribute to a city's economy in terms of employment, job creation and innovation;
- **Enabling Environment** identifies the tangible and intangible assets that help cities attract creative talent and stimulate cultural engagement.

The qualitative component includes highlights of cities' creative economy strategies or best practices in the field of cultural management to illustrate and complement the quantitative evidence, both on the cities' individual pages of the online tool and in the policy report.

We have then checked the score of these top performing cities on two selected indicators: 'Jobs in arts, culture & entertainment', that is the number of jobs per capita in arts, culture and entertainment sectors¹¹, and 'Tourist overnight stays', namely the number of tourist overnight stays per capita¹².

While all cities in the Top 30% score relatively well on both indicators, important distinctions can be made if comparing their score to the average score of cities with similar population. We can indeed distinguish cities with Very High, High, Medium or Low arts/tourism-jobs intensity, where the higher the intensity, the higher the potential exposure to the disruptive effects of the pandemic.

Looking at Very High levels of arts jobs intensity, 15 cities seem to be particularly at risk (Figure 5). These are: Paris (France) and Milan (Italy), among XXL cities with more than 1 million inhabitants; Copenhagen (Denmark), Stockholm (Sweden), Stuttgart (Germany), Frankfurt (Germany), Helsinki (Finland) and Vilnius (Lithuania), among XL cities with inhabitants between 500 000 and 1 million; Florence (Italy), Venice (Italy), Tallinn (Estonia) and Bologna (Italy), among L cities having between 250 000 and 500 000 inhabitants; and Weimar (Germany), Tartu (Estonia) and Mainz (Germany), among S-M cities with inhabitants between 50 000 and 250 000. Values range from 138 arts jobs in Paris to nearly 60 jobs in Mainz, per 1,000 inhabitants.

However, the arts category groups together very different kinds of jobs that will be diversely affected by the crisis and possibly at different points in time. For instance, the lockdown measures obviously impacted production. The closure of theatres and festivals has led to the cancellation of the performances for which the production process had already been completed. In some cases, contracts include clauses regulating and covering cancellation risks, whereas in others the consequences of the failure to go on stage for already completed productions has remained entirely on the shoulders of companies or orchestras whose pay is based upon actual number of performances and not on number of rehearsals or time spent on them. In addition, new productions are inevitably at high risk. Working remotely may be an alternative option in some cases - for instance in the fields of arts and culture education - but there is no doubt that *live* entertainment by definition requires physical proximity in all stages of production. Likewise, entire exhibition seasons have been cancelled with no possibility of recovering costs due to the impossibility to keep museums and galleries open. Many museums have suddenly faced a dramatic prospect of financial meltdown and uncertainty as to their short-term survival¹³, unless alternative ways to return to activity, and in particular to host events and programmes for paying visitors, are quickly found.

Which cities are therefore likely to be the most impacted by the crisis from a cultural occupation viewpoint? Answering is difficult without also considering the specific local conditions of arts workers (e.g. employed vs. self-employed, full-time vs. part-time, permanent vs. temporary, etc.) or special unemployment frameworks in place in certain countries (e.g. the '*statut d'artiste*' in Belgium or the '*intermittents du spectacle*' in France). However, we can assume that the *general* economic impact is likely to be higher in those cities with higher

¹¹ More precisely, this indicator includes jobs in arts, entertainment and recreation; other service activities; and activities of household and extra-territorial organizations and bodies (NACE Rev. 2, R to U). More disaggregated data (i.e. including only jobs in arts, entertainment and recreation) are not available in Eurostat's city statistics.

¹² The Monitor also includes two indicators on jobs in media and communication (TV, cinema, radio, music, book publishing and video games) and jobs in other creative sectors (architecture, advertising, design and fashion). Of course, also jobs in these subsectors may be at high risk (think of audiovisual productions cancelled or the reduced expenditure in advertising, to name just a few examples). However, as the job groupings for these industries are relatively broad and include many knowledge-based jobs (e.g. digital workers) that will probably be less affected by the crisis, we propose focusing the analysis on the first grouping only.

¹³ On the impact of COVID-19 on museums in Europe, see the results of the Network of European Museum Organisations' (NEMO) survey: https://www.nemo.org/fileadmin/Dateien/public/NEMO_documents/NEMO_COVID19_Report_12.05.2020.pdf

shares of arts jobs due to the incompatibility of most arts jobs with teleworking and, more importantly, the strong interdependence of the cultural supply chains with other supply chains, from tourism to food and transport, in the first place¹⁴. These mostly include medium and large-sized Italian cities like Florence, Venice and Bologna but also Weimar and Mainz in Germany where arts jobs account approximately from 9 to 12% of the total local jobs, versus smaller shares in capital or XXL cities (between 5 and 8% in Paris, Copenhagen, Stockholm, Stuttgart, Frankfurt, Helsinki, Tallinn and Vilnius). Nevertheless, the share of arts jobs is as high as in smaller cities in a city like Milan, where CCS are a main driver of the local economy (9%) (Figure 7).

Interestingly enough, while arts jobs intensity reflects what we could define as the 'artistic orientation' of a city, the job share more precisely reflects the composition of the economy. So, for instance, while Paris has a clear 'artistic orientation', its economy relies less on arts than many other smaller cities certainly due to its bigger and more diversified economy and job market.

¹⁴ The diffusion of variable remuneration on sales, the production logics in place, the length of the supply chains and the variety of their links (artistic, technical and administrative) creates not only effects in the single cultural and creative sectors but a long, intense and persistent domino effect *across* sectors. On the 'domino effects' of the COVID-19 pandemic on the cultural and creative sectors see Dubini, P. (2020). L'effetto domino del Covid-19 sull'economia delle filiere culturali, *AgCult*. <https://agcult.it/a/16656/2020-03-31/sviluppo-sostenibile-l-effetto-domino-del-covid-19-sull-economia-delle-filiere-culturali> and Leenknecht, S. (2020). Artsfield in lockdown, *Flanders Arts Institute*. <https://www.kunsten.be/en/now-in-the-arts/arts-field-in-lockdown-2/>

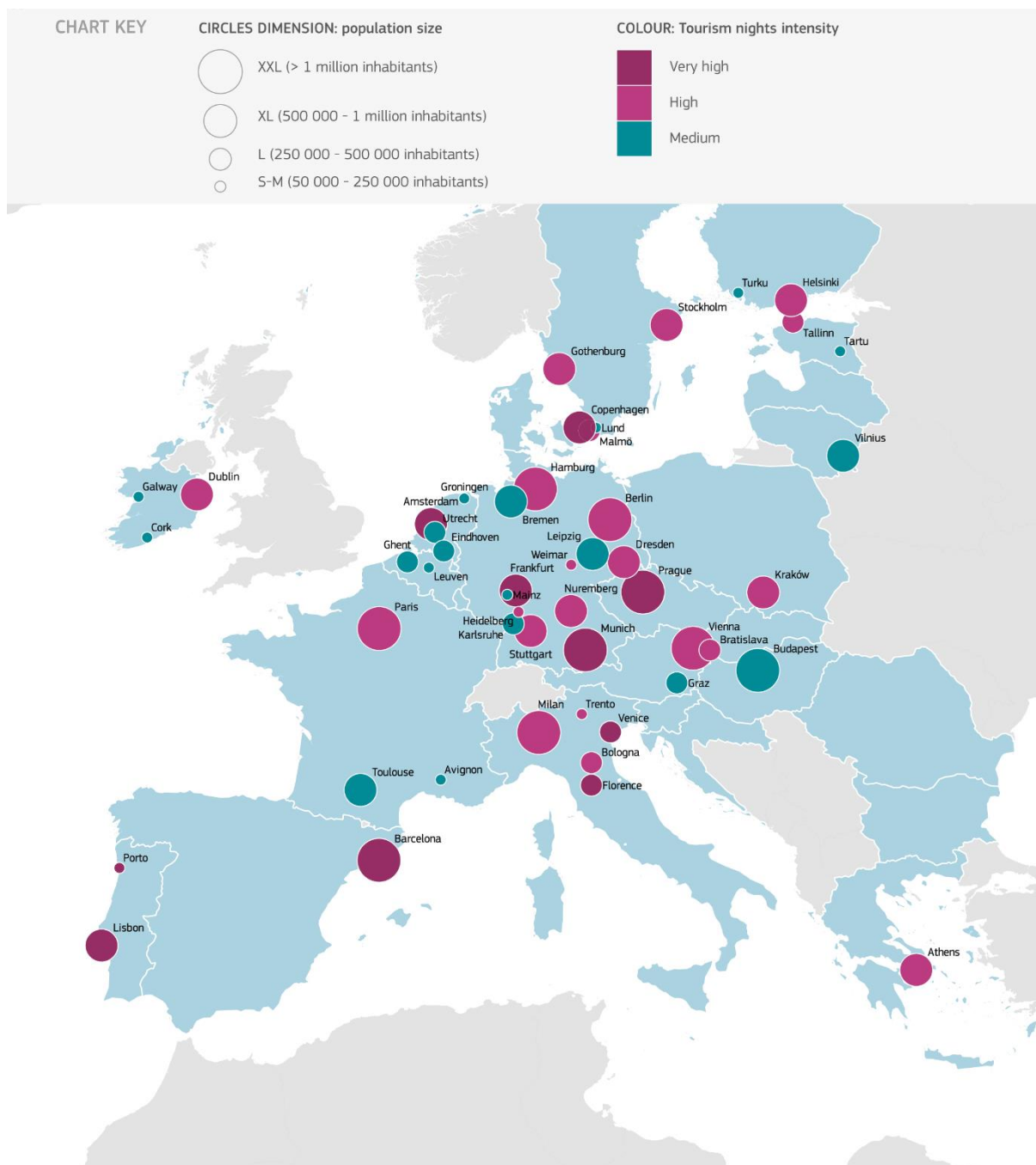


Figure 6. Tourism jobs intensity among the Top 30% Cultural and Creative Cities

Note: The ranking is based on 170 cities in the EU 27 member states out of a total of 190 European cities included in the Cultural and Creative Cities Monitor due to better data coverage. See Montalto et al., 2019 for more details. The intensity is determined as follows: 'Very high' if the 'Tourist overnight stay' / 'Jobs in arts, culture & entertainment' score is above the tourist nights / jobs in arts standard deviation value for cities in the same population group; 'High' if the 'Tourist overnight stay' / 'Jobs in arts, culture & entertainment' score is above the tourist nights / jobs in arts average value for cities in the same population group but below the standard deviation value; 'Medium' if the 'Tourist overnight stay' / 'Jobs in arts, culture & entertainment' score is below the tourist nights / jobs in arts average value for cities in the same population group but above the standard deviation value (multiplied by -1); 'Low' if the 'Tourist overnight stay' / 'Jobs in arts, culture & entertainment' score is below the standard deviation value (multiplied by -1) for cities in the same population group. Cities are classified into four groups: XXL group > 1 million inhabitants; XL group, 500 000-1 million inhabitants; L group 250 000-500 000 inhabitants; S-M group 50 000-250 000 inhabitants.

Source: European Commission, Joint Research Centre.

As regards tourism, 10 cities seem to be particularly exposed to the reduction of tourism flows (Figure 6): Munich (Germany), Prague (Czechia) and Barcelona (Spain), among XXL cities; Copenhagen (Denmark), Lisbon (Portugal), Amsterdam (Netherlands) and Frankfurt (Germany), among XL cities; Florence and Venice (Italy), among L cities; and Porto (Portugal), among S-M cities¹⁵, with values ranging from 9.7 nights per capita in Munich versus 44.6 in Venice.

However, at least two additional indicators are needed to refine the analysis: the percentage of jobs that tourism¹⁶ accounts for in the local job market, and the share of international guests in each city, considering that international travel may be particularly hit by the pandemic (i.e. UNWTO estimates that international tourist arrivals may shrink between 58% and 78%, depending on different scenarios of re-opening of borders¹⁷). Both indicators show that two cities are particularly vulnerable, namely Florence and Venice where tourism accounts for approximately for 39% and 50% of the total local jobs (Figure 7), and foreign tourism nights for 73.6% and 86%, respectively¹⁸. Clearly, seasonality also counts: the cancellation of school trips, for instance, is likely to have a huge impact on all 'arts and heritage cities' and their museums, monuments and theatres.

Compared to arts jobs, tourism nights are more concentrated: only 10 cities feature a very high level of tourism intensity, among which many capital and larger cities. Florence and Venice are clearly outliers among cities of similar size. However, the tourism jobs share is much higher in smaller cities like Florence (39%), Venice (50%) and Porto (33%) than in larger cities where tourism accounts for about 20% of local jobs (Munich, Prague, Copenhagen, Amsterdam and Frankfurt). Barcelona (28%) and Lisbon (32%) are an exception to this scenario (Figure 7). Tourism jobs however account for approximately one third of total jobs also in cities with lower tourism intensity values, namely in Trento (35.34%), Bologna (33.5%), Milan (30.8%), Tallinn (27.5%) and Athens, Bratislava and Hamburg (26%), among cities with High tourism intensity; and Vilnius (30%), Budapest (27.2%) and Avignon (27%), among cities with Medium tourism intensity.

If we sum up arts and tourism jobs shares (Figure 7), medium-sized cities in Italy (Venice, Florence, Bologna and Trento) but also Porto, Avignon and Tallinn and larger cities as Milan and Barcelona appear to be the ones particularly exposed to the crisis caused by the COVID-19 pandemic which will likely reverberate for many months, if not years.

¹⁵ It might be surprising not to see Paris among these cities. The reason why Paris has a high instead of very high tourism intensity is to be attributed to the fact that tourist nights are distributed on a geographically larger area (Greater Paris) than the one covered by the Monitor (City of Paris), which is where tourists tend to concentrate.

¹⁶ More precisely, this indicator includes jobs in trade, transport, hotels, restaurants (NACE Rev. 2, G to I).

¹⁷ <https://www.unwto.org/international-tourism-and-covid-19>

¹⁸ <https://www.istat.it/it/files//2019/11/Movimento-turistico-in-Italia-2018.pdf>

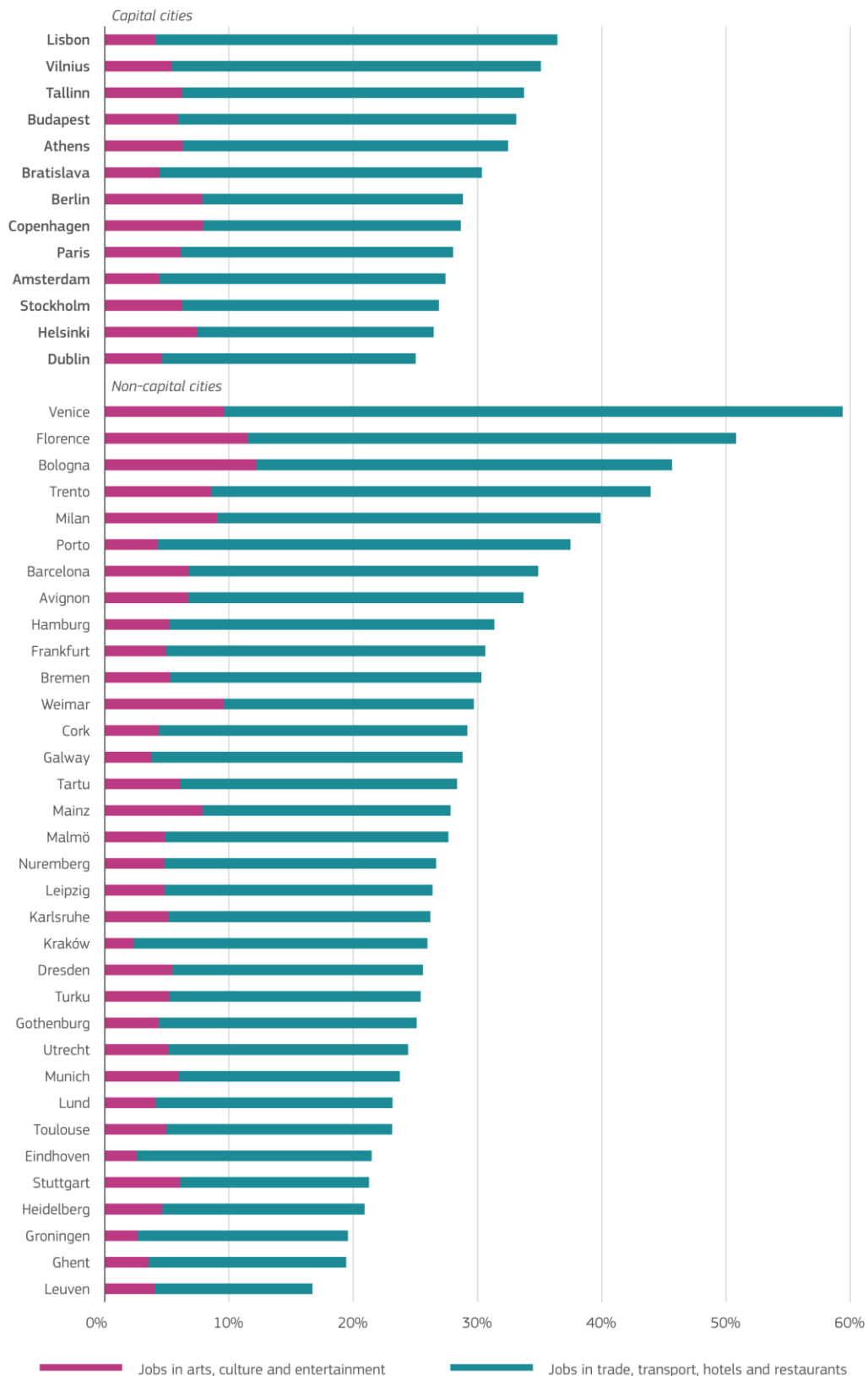


Figure 7. Share of arts and tourism jobs on total jobs

Source: European Commission, Joint Research Centre, based on Eurostat's Urban Audit, most recent years combined (2011-2016). Labour market - cities and greater cities [urb_clma], NACE Rev. 2, R to U and NACE Rev. 2, G to I.

Despite their possibly higher vulnerability, especially in Southern Europe, medium-sized cities are in some cases already proving their capacity to adapt to shocks and ‘bounce back’ (see Box 2). Also, as shown since the first edition of the Monitor, on average smaller cities have more cultural infrastructures such as museums, theatres, cinemas and concert halls per capita than larger ones (Montalto, Tacao Moura, Langedijk, & Saisana, 2019). As cultural participation is increasingly found to be a significant determinant of individual and collective well-being (e.g. Agovino, Crociata, Quaglione, Sacco, & Sarra, 2017; Grossi et al., 2012; World Health Organization, 2019), cultural venues and facilities today represent a key asset for cities wishing to meet re-discovered socialisation and happiness needs. Building on this growing evidence, the local cultural infrastructure could be put at the core of post-COVID resilience and recovery strategies, thus becoming the backbone of new welfare and educational services for the local community.

In close cooperation with the cultural departments of the 190 cities of the Monitor, we have identified a number of inspirational practices across Europe by cultural organisations or city councils’ cultural departments that have reacted to the coronavirus crisis by re-inventing their role or experimenting new formats to engage more and more effectively with the surrounding communities.

Box 2. Bouncing back in COVID-19 times: how cultural venues and events re-think themselves

Re-thinking missions, starting from local communities’ needs

As a response to the COVID-19 crisis, the MAMbo¹⁹ museum in **Bologna** (Italy) has reconfigured its space to welcome selected artists living in the city to work on their projects, thus transforming itself into a production and residence centre for artists. In the exhibition spaces of the museum there will no longer be more or less historicised art works, but the studios of workers particularly affected by this crisis such as visual artists, photographers and designers.

In **Leeds** (United Kingdom), the Slung Low theatre company²⁰ stood up to meet the new societal needs emerged during the lockdown. The company coordinated a team of around 90 volunteers including some from other arts organisations in the region - from Opera North and Yorkshire Sculpture Park to theatre company Red Ladder - to deliver food and medicines. On the top of that, the company appeared regularly online from Slung Low’s Head Quarter to keep locals’ spirits up.

Municipal libraries in many different cities kept in touch with citizens. For instance, the Municipal Library in **Prague** (Czechia) kept a phone contact with elderly clients to emotionally support them, while the **Turin** (Italy) Municipality Libraries launched new services during the confinement period, such as language exercises and book readings. The City Library of **Gothenburg** (Sweden) instead asked citizens about their book preferences and then prepared ‘take away bags’ with books matching people’s tastes²¹.

Similar initiatives were initiated to bring performing arts to socially disadvantaged groups. For instance, with the UitinGenTV pilot project, the City of **Ghent** (Belgium) brought recordings of cultural productions to the elderly in residential care centres²², while the actors of the GONG Theatre²³ in **Sibiu** (Romania) read stories to elderly people over the phone.

Experimenting novel formats, aka: the mountain safely goes to Mahomet

Hrajeme do oken (‘We Play at your Windows’)²⁴ is a new project launched in **Prague** during the confinement period to bring together musicians without audiences and music-lovers who had to spend their time at home. The rules are simple: anyone can apply for a concert outside their house, in front of a hospital or nursing home. The format is meant to protect both the musicians and the audience. *Hrajeme do oken* follows the well-established project ‘Vážný zájem’ (‘Serious Interest’)²⁵, which brings classical music concerts to peoples’ homes. In this case, the music genres vary from classical music to jazz and alternative music.

¹⁹ <http://www.mambo-bologna.org/>

²⁰ <https://www.slunglow.org/>

²¹ <https://www.stadsbiblioteket.nu/take-away/>

²² <https://stad.gent/nl/cultuur-sport-vrije-tijd/nieuws-evenementen/stad-gent-programmeert-cultuur-woonzorgcentra-met-uitingentv>

²³ <https://www.teatrulgong.ro/>

²⁴ <https://hrajemedooken.cz/>

²⁵ <https://vaznyzajem.cz/>

In **Liepāja** (Latvia), the culture department of the city council organised courtyard concerts throughout the city. The novelty here was that concerts (also livestreamed) showed up in courtyards as a surprise in the evening for a 40 min performance, restricted to maximum 24 people. There was no advertisement and no one was informed about the schedule in advance.

Similarly, **Aarhus** Music House (Denmark) proposed 'take away concerts'²⁶ to be enjoyed live in backyards or online at home; while in **Athens** (Greece) 'on the road' concerts were organised using a vehicle moving around the Greek capital's neighbourhoods. In **Łódź** (Poland), the Łódź Event Centre cultural institution²⁷ started to produce rooftop concerts of different music genres, with audiences joining from their balconies. In **Umeå** (Sweden), the Swedish opera company Norrlandsoperan²⁸ started to offer outdoors dance experiences where the audience can decide everything from characters to music and props. The service is available for free and can be booked by any private individual, workplaces, accommodation and schools.

Initiated by livekultur mannheim e.V. with the support of UNESCO City of Music and in cooperation with the Alte Zigarrenfabrik Sandhausen and United We Stream Rhein-Neckar, MC²-Mannheim Connects Culture is the streaming format for culture from **Mannheim** (Germany). The audience can follow the streamed events at home or from their balcony²⁹.

Testing business models under new formats...and with a green twist

Born in **Berlin** as a response to the shutdown of the Berlin's nightlife, United We Stream³⁰ currently exists in dozens of cities to offer electronic music lovers varied DJ sets every day. Thanks to its underlying donation system and monetisation of livestream flows, United We Stream succeeds in raising funds contributing to the financial survival of the music and live performance sector.

Fresh Agency, Live Club, and Shining Production, three companies with a twenty-year experience in the world of entertainment, are proposing a new ecological configuration of live events, namely a 'bike version' of the drive-in format³¹. The idea – currently being tested in **Milan** (Italy) and the surrounding areas – is to stage cultural activities in any field in open spaces where people can enjoy at the same time culture and nature, in safe conditions, either individually or in groups. The event would also be livestreamed.

In **Turin** (Italy), the Goodness Factory developed a new digital performance concept (deLIVeRy³²) to address three challenges: increased saturation of social media, lack of quality control and failure to recognise artists' compensation rights and the economic value of arts performances in the digital realm. deLIVeRy charges you for food and drinks but gives free access to exclusive content. A percentage of the proceeds goes to the artists involved.

Vilnius (Lithuania) launched 'Aerocinema'³³, the first-time drive-in movie theatre in an airport in the world resulting from the Lithuanian capital airport's partnership with Vilnius International Film Festival. Many other cities are seeing a revival of the drive-in cinema concept, such as **Gdańsk** (Poland), offering a free session for those having a Gdansk-based restaurant receipt³⁴. Drive-in concerts are proposed in **Aarhus** (Denmark)³⁵ and open-air theatre programmes in **Sofia** (Bulgaria)³⁶.

If we consider cultural venues as community service providers, citizens' spatial proximity to such venues becomes a key element to ensure that a variety of cultural participation opportunities is available at a reasonable distance. In the 2019 edition of the Cultural and Creative Cities Monitor, we have calculated the average minimum distance between citizens and the closest cultural venue in European cities. Focussing on the 50 cities targeted in this report, distances to cultural venues seem to be generally similar across cities with

²⁶ <https://musikhusetaarhus.dk/praktisk-information/nyheder-artikler/nyheder/musikhusets-take-away-koncerter/>

²⁷ <http://centrumwydarzen.lodz.pl/o-nas/>

²⁸ <https://norrlandsoperan.se/en/about-norrlandsoperan/>

²⁹ <https://www.facebook.com/mannheimconnectsculture/>

³⁰ <https://unitedwestream.berlin/>

³¹ <https://www.bike-in.it/>

³² <https://www.livedelivery.it/>

³³ <https://kinopavasaris.lt/en/about-aerocinema>

³⁴ <https://kino.gcb.visitgdansk.com/>

³⁵ https://pscenen.dk/praktisk-information/?fbclid=IwAR1yhQ_rL5RKLnArXC1KLj2e97miYzPJeWhdmNtzHdfB4c-2urssvVFICD0

³⁶ <http://sofiatheatre.eu/noviniibg.php>

different population size (Figure 8)³⁷, with the exception of Lund (Sweden). In particular, distances are particularly short for Paris and Athens among XXL and XL cities (approximately 1 km away from the closest cultural venue) and for Florence and Tartu among cities in the L and S-M groups (approximately 1.6 km away).

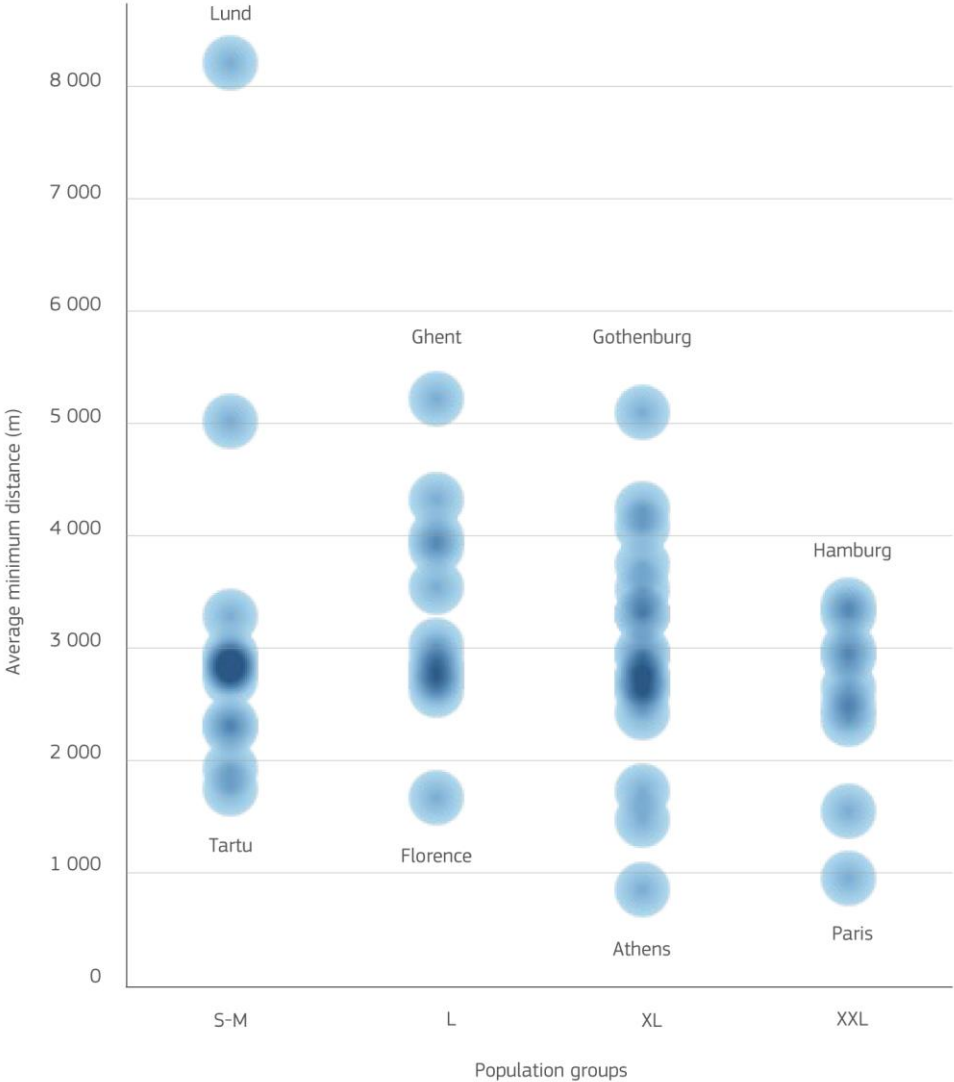


Figure 8. Average minimum distance to the closest cultural venue, meters

Source: European Commission, Joint Research Centre, based on OpenStreetMap.

Cultural venues also represent a main asset to attract visitors from nearby cities and regions, which could help compensate losses from international tourism³⁸ (on proximity tourism, see, e.g. Bertacchini, Nuccio, & Durio, 2019; Jeuring & Haartsen, 2017; Soria & Llurdés Coit, 2013). European cities are already moving in this direction: for instance, Vilnius has initiated a tourism campaign that aims to encourage Lithuanian residents to

³⁷ The similar distances, however, somehow hides the different configuration of cities of different size. In general, relatively low average minimum distances in bigger cities are due to the buildings’ density: density in bigger cities tends indeed to be higher and more homogeneous across the whole administrative boundaries. On the other hand, smaller cities are often characterised by smaller physical surfaces but lower density areas where the provision of cultural infrastructure is sparser.

³⁸ As estimated by a recent study by World Capital commented by Il Sole24Ore on 08 April 2020: <https://www.ilsole24ore.com/art/turismo-ripresa-e-possibile-ma-forti-incentivi-chi-viaggia-italia-ADHNpzI>

choose Vilnius as a travel destination; Milan is working on an agreement protocol with the cities of Genoa and Turin (Italy) to promote proximity tourism among these cities; while Prague is investing approximately EUR 3.7 million in a campaign to attract local tourists and provide vouchers to be spent on a selection of tourist points of interest, such as museums and art galleries. The city of Groningen (Netherlands) has instead launched a pitch for new ideas to re-think culture and tourism in post-COVID-19 times³⁹.

³⁹ <https://www.vno-ncwnoord.nl/cultuurpitch/>

3 Policy options: how to support cultural jobs and organisations

Recognising the need of a coordinated policy action to face such an unprecedented threat, the European Union has reacted to the crisis with a multi-tiered initiative to support workers and companies in the member states in all sectors: first, the EU is providing financial support to enhance the national policy responses to the mounting social employment crisis through three main instruments: the 'Corona Response Investment Initiative' (CRII), the 'Corona Response Investment Initiative Plus' (CRII+) and SURE ('Support to Mitigate Unemployment Risks in an Emergency'); second, the European Central Bank (ECB) and European Investment Bank (EIB) are offering support to avoid liquidity shortages and credit contraction; third, the European Commission has amended regulations to give more flexibility to particularly affected sectors (e.g. airline companies) or member states as well as proposed an ambitious emergency European Recovery Instrument ('Next Generation EU') amounting to EUR 750 billion⁴⁰.

Upon that, the European Union is providing specific support to CCS: first, it is redirecting its funding scheme for the cross-border distribution of performing arts works, launching a call over EUR 2 million to support digital culture and virtual mobility; second, it is speeding-up the evaluation of the 2020 cooperation projects funded by the Creative Europe programme so that the first substantial part of the overall sum of EUR 48.5 million allocated to these projects can quickly reach sector; third, it is exploring ways to adapt the CCS Guarantee Facility to mitigate adverse effects of the crisis. In addition, the EU is showing full flexibility for the deadlines of the Creative Europe programme and reinforcing links with EU member states, creative Europe desks, networks and platforms⁴¹.

Nevertheless, as culture is mostly a policy area of national, regional and local competence, it is above all the individual member states that have issued *ad hoc* economic measures for the most affected sectors, including that of culture. EU and world ministers of culture met twice online at the beginning of the pandemic to discuss actions to bolster the cultural sector in such a difficult moment: on April 8th (EU ministers of culture and media⁴²) and on April 23rd (when over 130 ministers and vice-ministers of culture joined the video conference convened by UNESCO)⁴³. Regional and city-level governments have also mobilised, especially in countries such as Italy or France where culture importantly relies on regions' and cities' budgets⁴⁴. The purpose here is not to provide an in-depth analysis of the measures adopted by governments at different levels, but to offer an overview of the main typologies of measures adopted by countries and cities to maintain cultural infrastructures but, above all, cultural jobs, on top of the countless number of bottom-up initiatives that are being developed across Europe.

Box 3. Culture-specific support initiatives: did you know that...?

In addition to policy measures issued from governments at different levels, many different initiatives have been launched in the arts and culture sector as a response to the COVID-19 crisis. In order to facilitate knowledge exchange, the platform **Creatives Unite**⁴⁵ has been set up with EU support. It offers a **common space for all CCS in Europe and beyond to share their initiatives and actions**, giving access in one single space to a multitude of existing resources, networks and organisations, and offering a curated space to co-create and upload contributions, and find shared solutions.

Many artists and organisations are then reaching audiences in a virtual way, by sharing (recordings of) new and extant work, mostly for free. Also, organisations managing authors' rights have set up special measures to support their members and new advocacy groups and campaigns have been initiated to make the sector and its workers more visible. For an overview, see the **EU Culture From Home** initiative from **Cultural gems**⁴⁶, the Cultural and Creative Cities Monitor's companion web app, and the mapping of authors' societies responses by GESAC, European Grouping of Societies of Authors and Composers⁴⁷ or CISAC, the International Confederation of Societies of Authors and Composers⁴⁸.

⁴⁰ [COM\(2020\) 442 final](#)

⁴¹ Regular updates on the EU policy actions to the coronavirus crisis that CCS can benefit from can be found [here](#).

⁴² [Declaration of 26 Ministers of Culture](#)

⁴³ See more [here](#).

⁴⁴ In France, for instance, the '[Note de conjoncture sur les dépenses culturelles des collectivités territoriales et leurs groupements \(2018-2020\)](#)' by the Observatoire des Politiques Culturelles shows that cultural expenditure of local authorities has increased for 53% of local authorities and remained stable for 17%.

⁴⁵ <http://creativesunite.eu/>

⁴⁶ <https://culturalgems.jrc.ec.europa.eu/>

⁴⁷ <https://authorsocieties.eu/covid-19-response/>

⁴⁸ <https://www.cisac.org/Our-Members/Covid-19-CISAC-member-emergency-measures>

Following the classification proposed by the Czech Republic's Arts and Theatre Institute⁴⁹, culture-specific national economic measures can be framed into four main typologies:

- 1) **Direct grant systems** operated by the State (or by city, see next section) such as the possibility to apply the costs of services rendered or cancelled in the statement of contributions already allocated;
- 2) **Indirect financial instruments** such as the postponement of tax payments, social security and welfare contributions or compulsory insurance premiums, or exemptions on rent payments;
- 3) **Compensations or other financial support** in connection with cancelled activities such as employment aids or the creation of relief funds, in some cases in cooperation with other public or private actors;
- 4) **Other measures** of various nature for instance to help artists and cultural professional retrieve information.

The country specific information gathered by the Compendium of Cultural Policies & Trends for 20 EU countries⁵⁰ can be classified under these four categories.

Annual **grants**, for instance, are planned to be paid in full by the Austrian Ministry for Arts, Culture, the Civil Service and Sport, even if not all activities can take place due to the pandemic. The aim is to ensure maintenance of operations and employment of staff. In Croatia, the crisis fund is planned to cover the activities that fall under the responsibility of the Ministry of Culture, the Croatian Audiovisual Center and the Foundation 'Kultura Nova', an operational and grant making foundation that provides professional and financial support to civil society organisations in the fields of contemporary arts and culture. The measure supports activities that were already approved but delayed due to the pandemic. In Czechia, the payment of the existing selective grants operated by the state or by cities and already allocated is also guaranteed. In Estonia, the state compensates the direct costs of events (culture and sports) cancelled due to the coronavirus in March-April. Germany has planned an extensive waiver of claims for events and cultural projects funded by the Federal Commissioner for Culture and Media and for film funding. In Italy, the EUR 245 million emergency fund for performing arts, cinema and audiovisual sectors guarantees the grants already allocated for the year 2020.

A number of **indirect financial instruments** have also been put in place in various countries: social security and VAT reliefs (specific to CCS or that CCS can benefit from) are for instance foreseen in Belgium, Czech Republic, Estonia, Greece, Italy, Latvia and Belgium. In particular, in Estonia the VAT rate for electronic publications and for e-books has been reduced to 9%, namely to the percentage applied to newspaper publications and printed books.

As regards **financial compensatory measures**, these are more diverse in nature and range from support funds to integrate lost income, to calls for new artistic projects / creations, to payment of medical expenses. In Austria, for instance, the existing Artists' Social Insurance Fund has been increased by EUR 5 million to compensate income losses of artists and cultural educators having difficulties to cover their living costs due to closures and cancellations. In Croatia, employers from any sector who can prove the impact of special COVID-19 circumstances can ask for EUR 433 per full-time worker and EUR 216 per part-time worker. Monument rent has also been suspended as an additional measure to help the economy. Greece has issued a number of special calls to support digital cultural initiatives as well as the development of short movies and documentaries, small theatre productions, visual artists and the design sector. Extraordinary support for the cinema venues has been put in place as well. In Estonia, the Council of the Cultural Endowment established a fund for people who have excelled in the field of culture, for medical expenses which are not covered by State health insurance. In Italy, compensatory measures include a monthly EUR 600 indemnity for certain typology of self-employed cultural workers.

Other types of **non-financial support** are mostly about information services like the FAQs page and the dedicated phone line⁵¹ set up by the Austrian Federal Ministry for Arts, Culture, the Civil Service and Sport to support cultural institutions and workers but also platforms gathering digital cultural initiatives⁵². The website of the French Ministry of Culture also includes a page⁵³ containing detailed information about the national

⁴⁹ <https://www.idu.cz/en/news-and-current-events/news/1490-mapping-the-impact-of-the-ministry-of-health-s-extraordinary-measures-on-the-czech-independent-arts-sector-a-summary>

⁵⁰ <https://www.culturalpolicies.net/covid-19/>

⁵¹ <https://www.bmkoes.qv.at/Themen/Corona/Corona-Kunst-und-Kultur.html>

⁵² See digital cultural initiatives from state-owned cultural institutions, for instance, collected and promoted by the Italian Ministry of Culture on its [website](#)

⁵³ <https://www.culture.gouv.fr/Aides-demarches/Covid-19-le-ministere-informe-les-professionnels/Covid-19-les-dispositions-pour-la-Culture-secteur-par-secteur>

measures in place to support the sector. A very important non-financial support measure has recently been announced in France: on May 6th, the French government confirmed the much awaited extension until August 2021 of the unemployment rights of the temporary performing artists and technicians (*intermittents du spectacle*).

Although not covered here, it is important to remember that in some countries important measures are being taken at regional level too: in Belgium⁵⁴, for instance, cultural policy is mostly a competence of the language Communities and measures that affect the arts and culture sector come from different government levels. In Germany, too, the federal states measures take very different forms due to cultural federalism⁵⁵.

A comparative table by country and typology of measures is available on the Compendium's website⁵⁶.

3.1 City-specific measures

While most EU national governments have taken the lead to minimise the socio-economic impact of the pandemic on CCS, cities in many countries - and of all sizes - are playing an important role to complement responses to COVID-19 policy challenges on the ground.

In many countries, the role of cities has been two-fold: on the one hand, cities have acted as implementation vehicles of nation-wide measures such as clarifying how to access the support measures or by quantifying impacts to plan complementary measures; on the other hand, cities have been spearheading more bottom-up, innovative responses while resorting to technology or other resources and building on their unique proximity to citizens to bring culture 'at home' through digital but also physical services.

Although it is difficult to obtain a comprehensive overview of measures for CCS adopted by city governments, the analysis of the information collected from four main sources (the JRC city survey on COVID-19 effects, Eurocities, OECD and city councils' websites) shows that measures at this level also fit into the four categories of support identified above. In addition to the following summary of the measures identified, numerous links are provided in the next few paragraphs for a more in-depth understanding of the city's policy response to the COVID-19's effects on CCS.

As regards **grants**, Barcelona (Spain) - one of the first cities to launch measures "*for alleviating the coronavirus's effects on the city's cultural fabric*" - has for instance advanced fees for postponed programmes, such as the *Quinzena* and *Districte Cultural*⁵⁷. Lisbon (Portugal) has guaranteed to cultural agents the full payment of contracts already signed by EGEAC (the municipal company responsible for managing some of Lisbon's key cultural spaces and for organising *Festas de Lisboa* and other street festivals), promoting, whenever possible, the rescheduling of events and activities. The city has also accelerated payments to the cultural entities that already receive support from the city, with a view to supporting the maintenance of the respective operating structures⁵⁸. Stockholm (Sweden) has adopted three main support measures for CCS, among which the waiver of the requirement of repayment of 2020 grants⁵⁹. Vilnius has adopted an ambitious plan of actions (the 'Vilnius 4x3 plan'⁶⁰) which include numerous culture-specific support measures, such as the opportunity for event organisers to move the date of festivals/events or to change the format of planned events or activities. In Heidelberg (Germany), culture-specific measures include early payment of grants (i.e. city beneficiaries such as cultural institutions, privately run kindergartens, social projects can receive 80% of the grant approved for 2020), the city's monthly payments to partners (or individuals) for existing contracts, even if the agreed services cannot be provided, and deferral of payments due to the city (for example fees, trade tax, property tax, rent) until July 31, 2020.

Indirect financial instruments in some cases include tax reliefs for cultural organisations open to the public and for audiovisual shootings (Barcelona) and, mostly, rental payment exemption for cultural institutions and / or individual artists operating in municipal spaces (e.g. Lisbon, Bologna-Italy). In particular, upon resumption of the issue of invoices, one can choose to pay the previous instalments in a single instalment or to pay in instalments without interest and late payment. For those who choose a single instalment, to be paid by

⁵⁴ <https://www.culturalpolicies.net/covid-19/belgium-flanders/>

⁵⁵ <https://www.culturalpolicies.net/covid-19/germany/>

⁵⁶ <https://www.culturalpolicies.net/covid-19/comparative-overview/>

⁵⁷ <https://www.barcelona.cat/barcelonacultura/en/recomanem/barcelona-launches-extraordinary-measures-tackle-impact-covid-19-virus-citys-cultural>

⁵⁸ <https://covidnews.eurocities.eu/wp-content/uploads/2020/04/Info-medidas-Cultura-para-traduc%CC%A7a%CC%83o-ING.pdf>

⁵⁹ <https://start.stockholm/aktuell/nyheter/2020/04/stodpaket-till-det-fria-kulturlivet/>

⁶⁰ <https://vilnius.lt/en/2020/05/05/its-official-vilnius-introduced-its-plan-for-combating-after-effects-of-the-pandemic/>

November 2020, there will be a discount. For some activities, there will be also the possibility of extending the contractual duration free of charge for the period of time corresponding to the suspension of activities.

Financial compensatory measures have been diversely mobilised: a major financial boost comes from the municipality of Amsterdam (Netherlands) which is deploying an additional EUR 17 million fund as part of a plan intended to save essential cultural and arts institutions⁶¹. In addition, the Amsterdam Fund for the Arts, which manages arts subsidies on behalf of the city, has launched a fast track fund for art projects that respond to the coronavirus crisis. Applicants are encouraged to reach out to citizens (digitally) and reflect on the current crisis. The amount differs from EUR 1,500 to 5,000. Berlin (Germany) has issued a EUR 100 million support package aimed at small and micro enterprises from any sector⁶². Small businesses and freelancers can get up to EUR 5,000 grants as emergency aid. London (United Kingdom) has set up a EUR 2.6 million Culture at Risk Business Support Fund⁶³. Barcelona has opened a EUR 1 million call of extra subsidies aimed at most vulnerable structures linked to grass-roots culture in all its variants and sectors (local theatres, creation spaces, cultural cooperatives and other entities in the sector) and foreseen an extra investment of EUR 1 million for Barcelona's libraries to boost their collections. Helsinki has established a fund for people and organisations affected by the closure of culture and leisure events to encourage new forms of engagement. The city has allotted a sum of EUR 300,000, with a maximum of EUR 5,000 euros available per applicant⁶⁴. Lisbon (Portugal) has taken a range of extraordinary measures. These include the Social Service Emergency Fund aimed at minimising the losses undergone (also) by cultural operators, namely artists, technicians and mediators, and cultural entities that has to reduce or stop their activities. The Portuguese capital has also planned to reinforce the acquisitions fund of fine arts works and extend its scope to the publishing and public art sectors.⁶⁵ Prague has planned to support cultural institutions and the tourism sector affected by the crisis with a subsidy of approximately EUR 9 million⁶⁶. In April, also Plovdiv (Bulgaria), European Capital of Culture 2019, set up a crisis fund to support independent artists. A one-time grant of EUR 510 can be requested by artists from all fields⁶⁷. Stockholm has set up temporary support measures for loss of revenue⁶⁸.

Non-financial measures are mostly about the extremely rich creation of new digital channels, campaigns or portals to offer people the opportunity to enjoy culture at home. For instance, the Barcelona Cultura portal⁶⁹ on the City Council website has been put at the service of all public and private initiatives, such as virtual tours of museums, talks, shows and concerts. Barcelona is working on the expansion of the Grec 2020 summer festival and the Expanded *Districte Cultural* in Barcelona to fit in the biggest possible number of productions offered by the Spanish and Barcelona theatre companies and which have been cancelled due to COVID-19. Valencia (Spain) has created online channels and programmes to promote exhibitions, events and digital books from the municipal cultural institutions such as the *Biblioteca Valenciana*⁷⁰. The City of Helsinki's network of Helmet libraries provides a wide variety of e-books, e-magazines, language courses and e-music services in several different languages through its shared e-Library service⁷¹. Warsaw is also promoting cultural events implemented by municipal institutions that have moved online⁷². Furthermore, Berlin (Germany) adopted Berlin(a)live⁷³, a joint project of the Senate Department for Culture and Europe and the Berlin agency 3pc, to bring artists and culture enthusiasts together. The online platform is the central point of contact for all Berlin live offers such as discussions, performances, DJ battles, operas as well as concerts and vernissages online. In addition, the platform also offers the opportunity to support artists and projects through donations.

⁶¹ <https://www.themayor.eu/en/amsterdam-a-17-million-euro-financial-injection-for-the-arts-and-culture-sector>

⁶² <https://covidnews.eurocities.eu/2020/03/30/berlin-support-for-local-businesses-and-culture/>, see also: <https://www.berlin.de/sen/kulteu/aktuelles/corona/artikel.910402.php>

⁶³ <https://www.london.gov.uk/press-releases/mayoral/new-fund-to-support-londons-at-risk-culture>

⁶⁴ <https://www.hel.fi/uutiset/en/kaupunginkanslia/helsinki-offers-express-funding-to-culture-sports-youth-work-school-lunches-to-continue>

⁶⁵ <https://covidnews.eurocities.eu/wp-content/uploads/2020/04/Info-medidas-Cultura-para-traduc%CC%A7a%CC%83o-ING.pdf>

⁶⁶ <https://www.idu.cz/en/news-and-current-events/news/1533-culture-in-quarantine-8>

⁶⁷ <https://sofiaglobe.com/2020/04/23/covid-19-crisis-fund-to-support-independent-artists-in-bulgarias-plovdiv/>

⁶⁸ <https://start.stockholm/aktuell/nyheter/2020/04/stodpaket-till-det-fria-kulturlivet/>

⁶⁹ <https://www.barcelona.cat/barcelonacultura/es>

⁷⁰ <https://www.hel.fi/uutiset/en/kaupunginkanslia/helsinki-offers-express-funding-to-culture-sports-youth-work-school-lunches-to-continue>

⁷¹ <https://www.um.warszawa.pl/aktualnosci/zosta-w-domu-z-kultur>

⁷² <https://www.um.warszawa.pl/aktualnosci/zosta-w-domu-z-kultur>

⁷³ <https://www.berlinalive.de/>

Stockholm has set up advice and coaching services for cultural businesses that have suffered from noticeable loss of income, such as on existing State, regional and municipal action packages as well as advice on local issues⁷⁴. Nantes (France) has reinforced the availability of culture at citizens' homes, by enhancing the existing digital offers (e.g. of books and readings, films, music, history, heritage, archives, archaeology, sciences, art history, live performances, etc.), by creating new services and new content by cultural institutions as well as by collecting proposals from the territory's cultural players. As a result, Nantes has seen an 83% increase of subscribers to the Facebook page of the Conservatory and to the collections page of the Arts Museum.

In Finland, the Association of Finnish Municipalities has published an inspirational guide on municipalities' support to CCS during the COVID-19 pandemic.

Box 4. Cities' support to cultural and creative sectors in COVID times: a good practices guide

The list of good practices published by the **Association of Finnish Municipalities** in co-operation with Forum Artis (the national association gathering Finnish artists' associations), *Kultury* (a Finnish trustee advocating for arts and culture) and the Copyright Information and Anti-Piracy Centre shows how municipalities are supporting CCS during the coronavirus crisis⁷⁵.

Seven typologies of **good practices** are identified and illustrated with concrete examples from Finnish cities. For instance, municipalities can employ artists from which local residents can 'order' arts. This is what Jyväskylä did: the city paid for a theatre play to be performed in a yard for isolated elderly people. Another option is to change the job profile of some cultural service employees to support crisis management. In Helsinki, for instance, orchestral musicians and librarians take care of seniors' needs, bringing them food bags. An alternative idea is to involve artists who are used to teach in the preparation of distance learning materials for schools, as Seinäjoki's cultural services department did.

Last, but not least municipalities may offer rental allowances to cultural operators and artists working on municipally owned properties, as indeed done by many different cities across Europe. The municipality can also increase cooperation between different actors and sectors in the production of cultural services. In Kotka, for example, the city theatre and the department in charge of cultural services opened a virtual cultural hotel. The hotel looks for local writers, poets, illustrators, painters, photographers, singers, musicians, composers and bands interested in sharing their work online.

Importantly, the publication invites municipalities to think about copyright before sharing any work. It provides a list of seven copyright organisations in Finland that can help make sure creative work is appropriately rewarded.

A more comprehensive mapping of cities' policies and support measures for CCS will be available on the Cultural and Creative Cities Monitor's online tool⁷⁶ in the coming months.

⁷⁴ <https://start.stockholm/aktuellt/nyheter/2020/04/stodpaket-til-det-fria-kulturlivet/>

⁷⁵ <https://kulttuurijataide.fi/taide-ja-kulttuurikentan-vinkit-kunnille-kuinka-kunta-voi-tukea-ja-tuottaa-taidetta-ja-kulttuuria-myos-korona-aikana/>

⁷⁶ <https://composite-indicators.jrc.ec.europa.eu/cultural-creative-cities-monitor/cultural-creative-cities>

4 Conclusions: seizing opportunities for more resilient Cultural and Creative Sectors

The COVID-19 pandemic is expected to significantly change the world. For the CCS, the coronavirus has in fact already accelerated digitalisation processes at a dizzying speed. Even more importantly, it has made clear that culture *does contribute* to the social and economic vitality of our societies: culture and the strictly connected sector of tourism have been widely recognised as some of the most affected sectors by COVID-19 in terms of lost revenues and jobs. As a result of this new awareness, the World Cities Culture Forum has, for instance, included fragile cultural work among its nine priority working areas to be addressed during and especially after the COVID-19 emergency.

Nevertheless, due to the highly fragmented and somehow informal nature of many cultural and creative activities, it is not easy to quantify losses. In this report, we have tried to set the scene, showing where major risks lie.

Data from Eurostat show that in EU-27 32% of persons working in culture are self-employed, compared to 14% in overall employment. Atypical workers such as the self-employed not only risk to lose their job/income but are likely to have no alternative sources of income or sick insurances. Effective protection of non-standard workers is crucial to cope with the socio-economic inequalities that the COVID-19 pandemic risk to magnify.

City-level data from the JRC's Cultural and Creative Cities Monitor show that some medium-sized European cities may be particularly vulnerable to the pandemic due to the high contribution of culture and tourism to the local job market, while capital and larger cities may count on larger and more diversified economies. However, their strong cultural and tourism infrastructure may support the re-organisation of the cultural offer towards nearby markets and the local communities. This could help compensate losses from international tourism but also help restore confidence and well-being among the local residents.

While not underestimating the dramatic impact of COVID-19, the pandemic provides a unique opportunity to upscale innovation and the use of online/digital tools to further democratise cultural participation. Many examples show how internet and smart phone applications are playing a critical role for communication, awareness-raising but also learning and skills development.

Most national governments have quickly reacted to specifically support cultural institutions and companies and, above all, maintain jobs. We have found positive signals also in some cities that responded promptly to the emergency, to support infrastructures and workers but also to help promote new digital initiatives.

Still, the biggest challenges start now. Medium and longer term measures are needed to accompany and support change in cultural institutions and professions, in accordance with long lasting European policy objectives. These include ensuring equal and fair access to culture, guaranteeing fair remuneration of artists and cultural operators, providing access to diverse cultural expressions, beyond mainstream content, and enabling transnational exchanges and cooperation as a driver of innovative ideas but also of new market opportunities.

While the formulation of policy recommendations goes beyond the scope of this report, some working directions seem to emerge from the analysis. A sustainable recovery of CCS will indeed require a truly out-of-the-box thinking to:

- Design new business models and new (digital) event formats accounting for social distancing and health safety rules and at the same time ensuring the cultural and financial sustainability of CCS' activities;
- Develop new partnerships at different government levels but also with public and private organisations to raise new funds (foundations, collecting societies, etc.);
- Co-create and strengthen links with the local communities (e.g. by setting up supporters' trusts);
- Change criteria / incentives to allocate funds (e.g. based on the work with local communities, audiences or schools);
- Cooperate with other sectors to develop novel (welfare) services (in the field of education, mental and physical health, proximity tourism, environment, etc.) to make the contribution of culture to societal well-being much more evident.

This is an opportunity to reinvent and widen the scope of cultural work, both for independent workers and cultural institutions, and make the contribution of culture to sustainable and resilient societies much more

visible and shared. The digital infrastructure and skills, too, should be strengthened to allow CCS to realistically benefit from online opportunities in a way that could complement, rather than replace, live experiences.

Last but not least, particular attention is required for medium-sized cities that have smaller markets compared to larger cities but also, on average, more cultural venues and facilities per inhabitant - a crucial asset to develop proximity cultural services and tourism in a time of travel restrictions, and possibly 'scale down' inspirational actions developed in other, larger cities.

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Annex 1. Cultural sectors and occupations

The two lists below include economic activities (NACE Rev. 2) and occupations (ISCO-08) that Eurostat uses to calculate aggregates for cultural employment using data from the EU-LFS.

18	Printing and reproduction of recorded media
32.2	Manufacture of musical instruments
58.1	Publishing of books, periodicals and other publishing activities
59	Motion picture, video and television programme production, sound recording and music publishing activities
60	Programming and broadcasting activities
74.1	Specialised design activities
74.2	Photographic activities
74.3	Translation and interpretation activities
90	Creative, arts and entertainment activities
91	Libraries, archives, museums and other cultural activities
216	Architects, planners, surveyors and designers
2353	Other language teachers
2354	Other music teachers
2355	Other arts teachers
262	Librarians, archivists and curators
264	Authors, journalists and linguists
265	Creative and performing artists
3431	Photographers
3432	Interior designers and decorators
3433	Gallery, museum and library technicians
3435	Other artistic and cultural associate professionals
3521	Broadcasting and audio-visual technicians
4411	Library clerks
7312	Musical instrument makers and tuners
7313	Jewellery and precious-metal workers
7314	Potters and related workers
7315	Glass makers, cutters, grinders and finishers
7316	Sign writers, decorative painters, engravers and etchers
7317	Handicraft workers in wood, basketry and related materials
7318	Handicraft workers in textile, leather and related materials
7319	Handicraft workers not elsewhere classified

For more details, see Eurostat's metadata at:

https://ec.europa.eu/eurostat/cache/metadata/en/cult_emp_esms.htm

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