

# **Study on ‘Cultural and creative sectors in post-COVID-19 Europe – Crisis effects and policy recommendations’ of 25/02/2021**

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# Structure of the Presentation

- 1. Pre-COVID-19 situation**
- 2. Effects of COVID-19 on CCS**
- 3. Analysis of COVID-19 policy support for CCS**
- 4. Perspectives beyond the crisis**
- 5. Policy recommendations**

# 1. Pre-COVID-19 situation in the CCS

- Highly fragmented organisation of creative value chains
- Project-based working processes
- (Not well-protected) IP-based revenue and income models
- High uncertainty about success and thus business risks
- Non-profit character of many activities



**Fragile organisational structures and working practices**

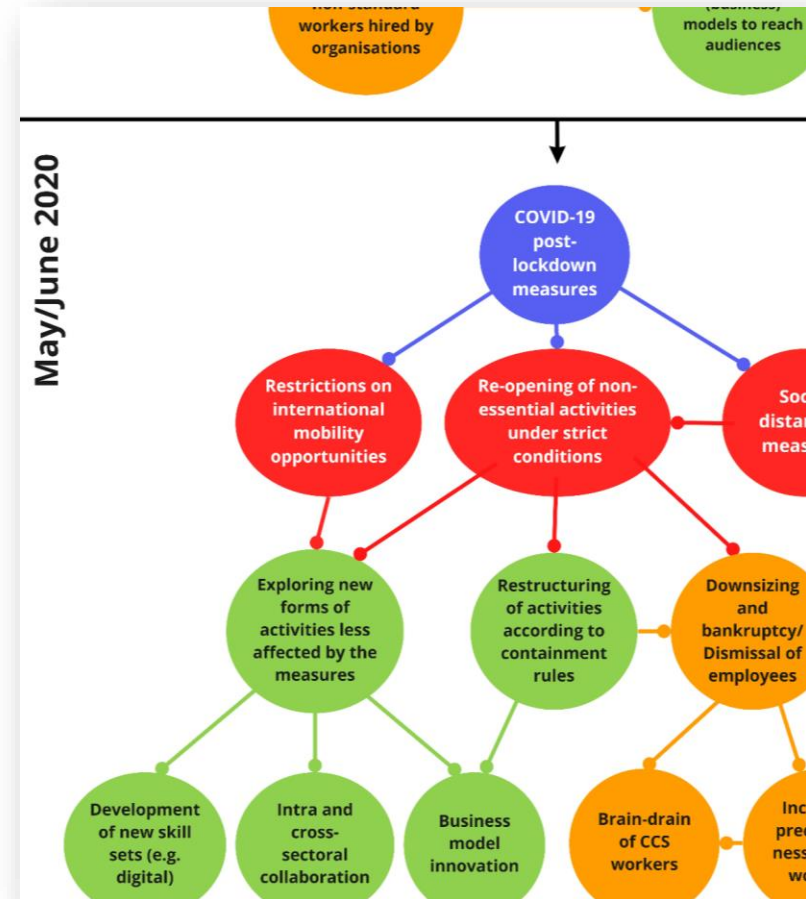
## 2. Effects of COVID-19 on CCS

### The CCS have been among the most negatively affected sectors

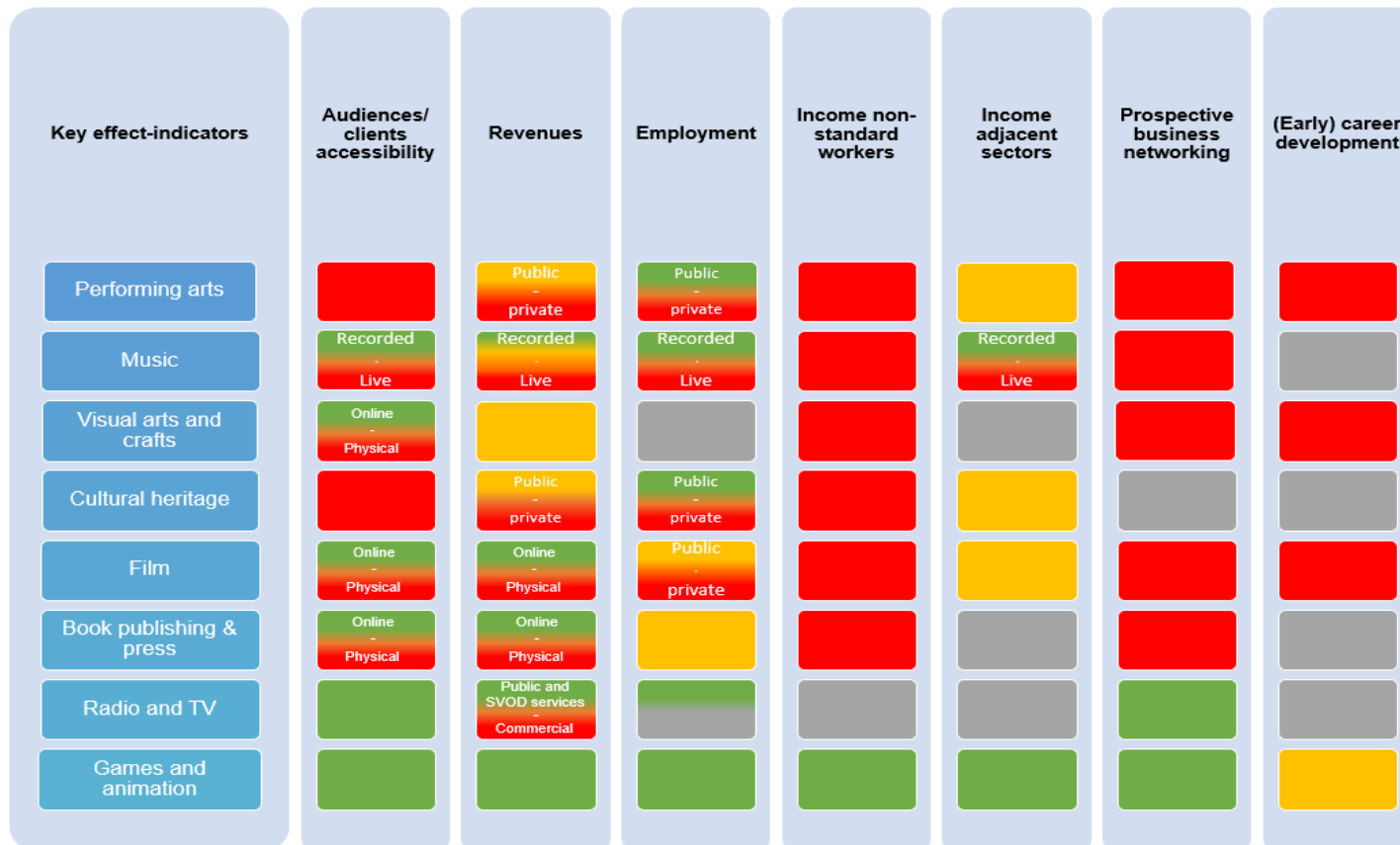
- Direct negative economic effects versus wider and longer-term social effects
- High vulnerability of non-standard workers

### Large differences among sub-sectors

### The effects were not only negative



# 2. Effects of COVID-19 on CCS: sub-sector impact heatmap



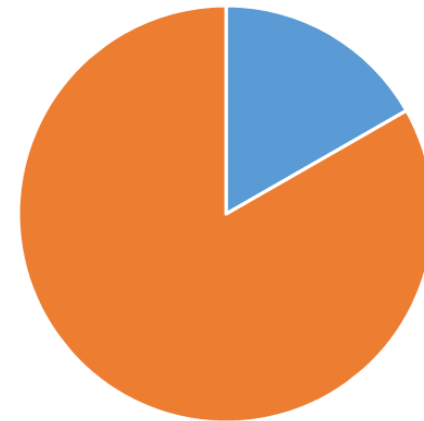
# 3. Analysis of policy support for CCS

**Most help provided from public sources**

**Main focus on emergency support**

**Fragmentation causes non sustainable working and living conditions in CCS**

**An illustrative approximation of CCS loss and help**  
Expected maximum loss of German CCS amounts to € 40 billion while culture-specific support programmes in the EU reach so far (a minimum) of € 8 billion



■ Support EU-27 ■ German CCS loss

# 3. Analysis of policy support for CCS

## CCS Income generation:

- Challenging frameworks persist related to new income sources for the CCS and the readiness of non-public investors to (re-)engage.
- Copyright is a central pre-condition to ensure income of creators.

## Cost-reduction and legal frameworks:

- Freelancers and artists in the cultural system are working under extreme uncertainty and often lack basic social rights.
- The added value of the European Union as a common market and territory of cooperation was partly lost.

## Innovation for and with the CCS:

- Innovation topics addressed during the 2020 crisis are too narrow, lack critical mass and broad impact.
- Capacity building needs are not sufficiently covered so far in the COVID-19 emergency and relaunch programmes.

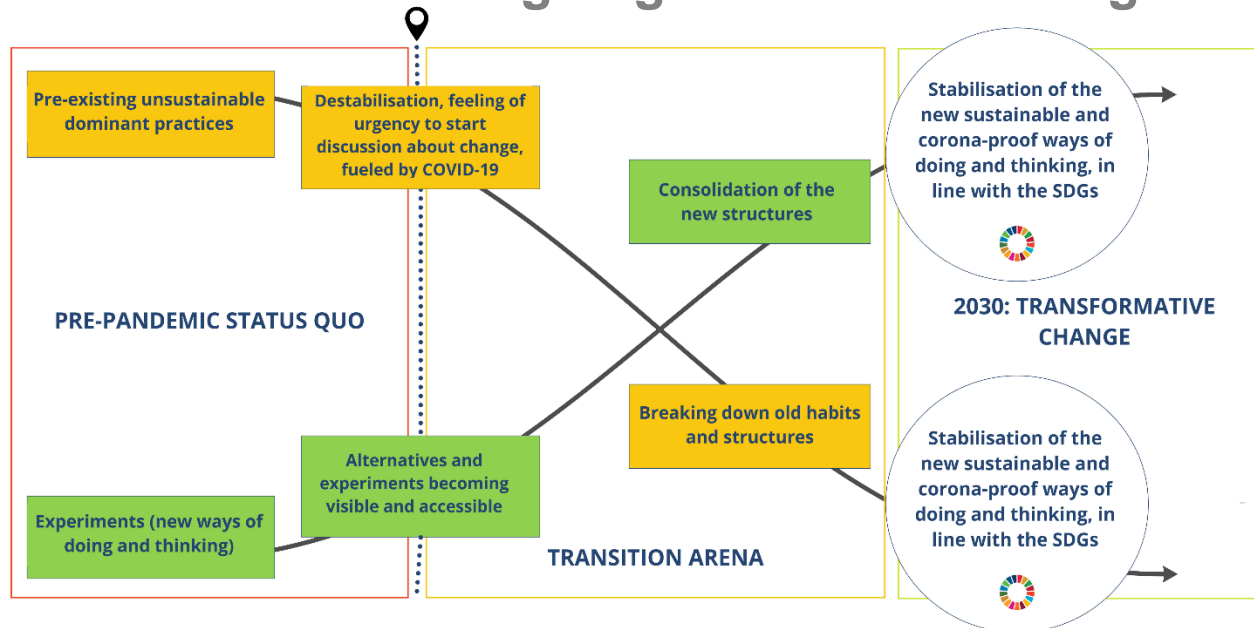
## Enhancing social cohesion:

- In 2020, culture and the arts have impressively shown their potential for contributing to social cohesion.
- International exchange and solidarity are a potential victim of the 2020 crisis.

# 4. Perspectives beyond the crisis

*"We won't go back to normal, because normal was the problem"*

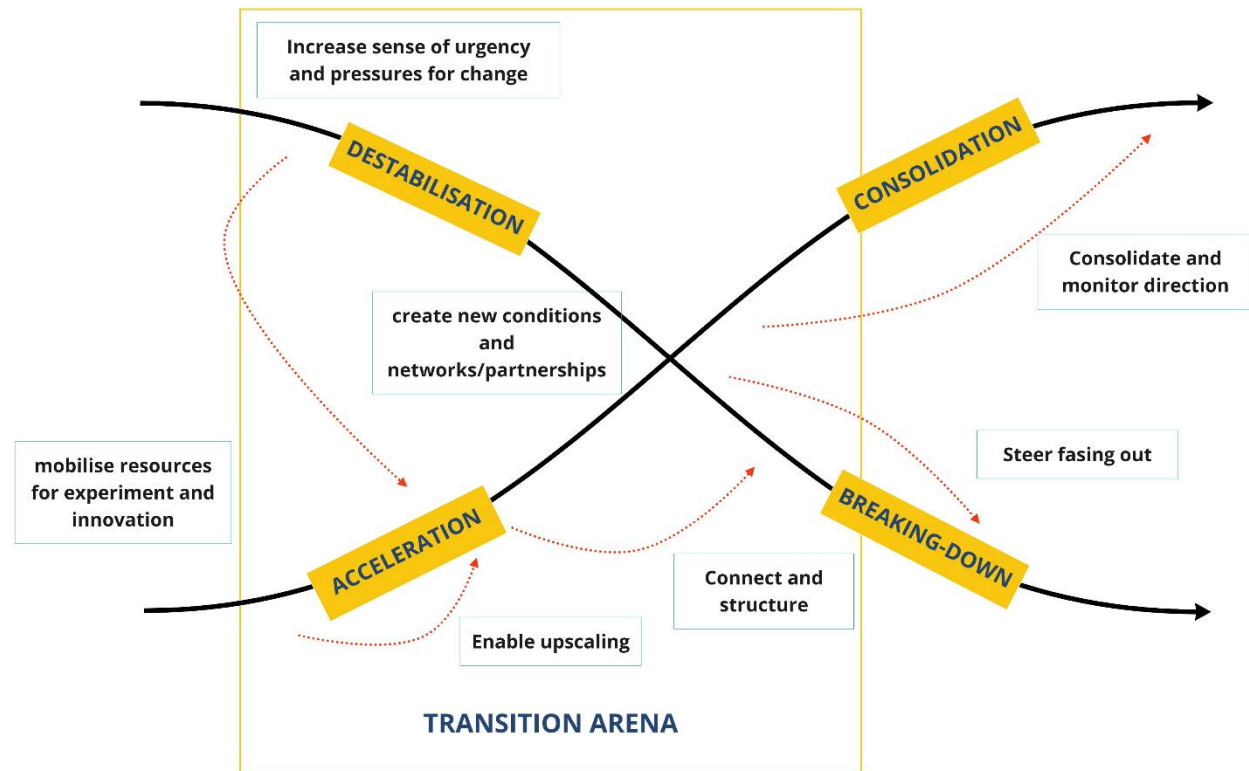
- The CCS need a more systemic change rather than only recovery
- The COVID-19 crisis provided a unique momentum to re-think existing practices and experiment with alternatives
- The crisis highlighted major opportunities to step up CCS' contribution to tackling large societal challenges



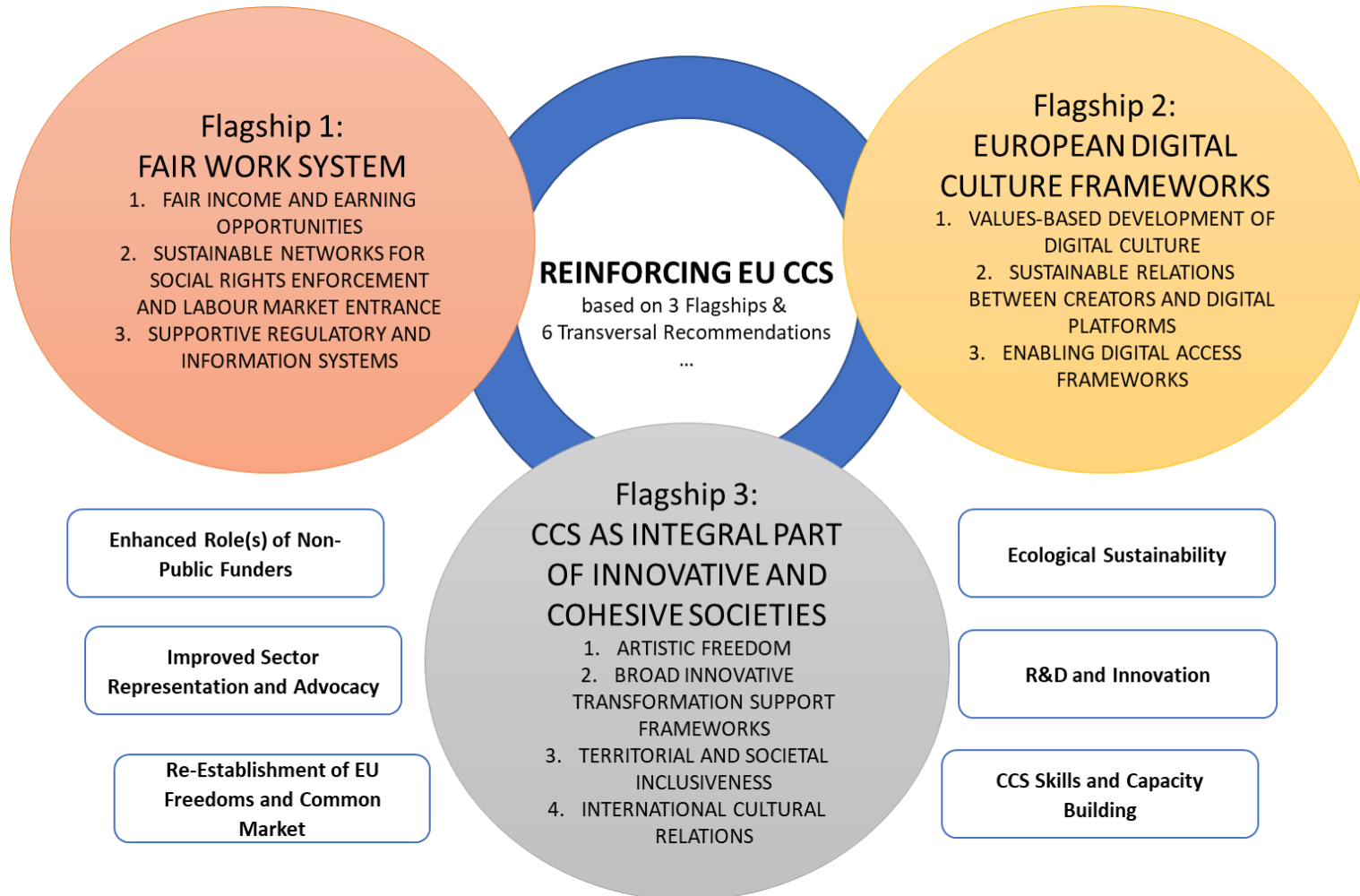


## 4. Perspectives beyond the crisis

- Policy makers have an important role to play in supporting transition processes
- A multi-faceted toolbox of policy measures is needed



# 5. Policy recommendations



## 5. Policy recommendations

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

- A fair CCS working system ensuring decent earning and social protection with a public sector leading by example
- A European way of digital transformation based on guiding democratic principles and addressing all kinds of digital divides
- Pluralistic culture and arts for social cohesion, societal development and international solidarity understood as fundamental pillars of democratic systems