Part II: Mapping Creative Labour in Canada

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Abstract

Despite the general assumption that the knowledge economy will produce a labour force which resembles the cultural sector in its core characteristics, knowledge gaps concerning creative labour remain.

How do countries map their creative workers? There is still little standardisation in measuring part time or self-employed workers around the world. In Canada, the last major intensive survey of the sector was conducted in 1993, and since then there has been a fundamental shift in best practices in ways to design such creative labour studies. The culture-based sector is both big and complex. The consensus among experts is that it is also under-documented, and under-represented in Canadian official statistics and labour market studies, many of which are founded on economic theories from the 1960s. If the casual voluntary workers are included, the cultural sector contributes over $6 billion to the GDP – a much larger share than traditional figures hint.

According to the partial maps that exist, high numbers of self-employment are not the only anomaly of the creative labour force in comparison to other economic sectors. As both the EU and the Canadian statistics demonstrate, creative labourers are not only better educated than the rest of the labour force but earn less than people in other professions who hold university degrees. Creative labourers both score incomparably high in holding temporary jobs as well as multiple jobs to make a living. However, official documents in Canada and Europe fail to map the incredibly diverse and differentiated work styles and employment situations of creative labourers in their entirety.

While there has been no comprehensive study of the sociological structure of Canada's creative labour force since 1993 (or elsewhere that we found), it is clear that there are sharp differences in status, training, credentials and the degree of "licensed autonomy" or professional independence obtained by various categories of Canadian cultural workers – rigidities which are emerging even as there is an increasing "fluidity" in job overlaps and job mobility. Such paradoxes suggest problems in the existing system of creative labour force adjustment, necessitating new thinking about the design of appropriate policy measures to harness sustainable economic growth and promote well-being.

The strong shift away from more traditional to informal forms of employment in the performing arts as a bellweather for other sectors in the creative economy is felt around the world, including China and the Russian Federation (ILO, 2004). The International Labour Office argues that this major shift in the composition of the sector leads to workers accepting contracts with lower conditions and poorer conditions than in the past. There is an urgent need for comprehensive, in-depth study of cultural workers to identify these and other factors that may present barriers in access to the means of creative expression.

Finally, a preliminary benchmark study of the arts and cultural not-for-profit organizations and creative enterprises shows they have little or no capacity to participate in intensive policy monitoring or independent public policy analysis and therefore are unlikely to be of direct relevance to any empirical discussion on the cultural economy. Furthermore, their size and lack of sustaining core resources often limits their capacity to innovate with policies that address the difficulties facing their members. Few can offer pension or other services, for example, for the more ephemeral of cultural workers. Among the many supply and demand side barriers facing creative entrepreneurs starting up their own businesses which have been identified around the world, the universal failing would seem to be in accessing adequate venture capital, or financing in very early stages of creation.

Introduction

The first part of this study confirmed a growing preoccupation with the creative economy in countries around the world struggling to adjust to globalization, and suggested that a broader cultural ecology framework was needed. Consistent with the premise of the concentric circle model by David Throsby, we now turn attention to mapping core cultural workers.

Mapping the cultural labour force in Canada

Jurisdiction for labour resides mostly at the provincial level in Canada but is shared. Since 1995, the Canadian Cultural Resources Council (supported by Human Resources Development Canada or HRDC) has worked to monitor and strengthen the cultural labour force, and has led or advised on most mapping exercises.[1] Despite over 15 years of effort, there is still no standardization in measurement of the Canadian cultural jobs that are non-traditional.[2] In a recent release of its labour force survey, Statistics Canada estimated the formal cultural sector, (defined also inexplicably to include information and recreation) at 768,000 jobs defined based on the content of the work, posting a small monthly decline (-26,000 jobs)[3]. By contrast, data from the fuller 2001 census data suggested about 516,000 jobs (or 3.1% of the total) for culture alone (Canadian Cultural Human Resources Council, 2004 Canada's Cultural Sector Labour Force[4]). The incidence of the inner core of sound, form, writing and movement disciplines is just under 1% or about 130,000.

In general, early mapping exercises in Canada used narrower definitions of the field and found unimpressive rates of growth in the late 1990s, compared to the UK, and

[1] The CCHRC develops and provides internship programs, career development tools, and cultureworks, a job fair.

[2] The Canadian Conference of the Arts, Canada Council and Statistics Canada collaborated on a substantive job definition of some 45 occupations, but often more than 90 are in use in other countries. See a discussion of methodology at http://www.culturalhrc.ca/research/G738_CHRC_AnnexA_intro_E.pdf. Not only will the season in which the Census is collected (a shoulder period for the arts) suppress estimates, the focus on the job most often excludes multiple part time jobs.

[3] http://www.statcan.ca/Daily/English/080208/d080208a.htm

[4] http://www.culturalhrc.ca/research/G738_CHRC_AnnexA_intro_E.pdf

thus apparently provided little pressure for setting the policy agenda for creative industry development. After an initial quick start in identifying the need to redesign its cultural statistics in a specially targeted cultural labour force survey in 1994-1995 (Provonost, 2002), Canadian statistical measurement has fallen behind other countries in the relevance, reliability and timeliness of its reporting on the cultural labour force. Much data is more than 5 years out of date. The culture-based sector is both big and complex. The consensus among experts is that it is also under-documented, and under-represented in Canadian official statistics and labour market studies, many of which are founded on economic theories from the 1960s. This makes developing a strategy for this sector, while important, also difficult (CCHRC 2004, Building on Success).

Looking at the partial statistics which map the creative labour market which are available in Europe and Canada, then, we find a contradiction between the structure of the labour market and existing policy approaches. Two documents that provide official statistics are illustrative: *The economy of culture in Europe* (2006) and *Economic contribution of culture in Canada* (2004). First, in terms of types of employment, *self-employment* in the cultural sector is significantly higher than in the economy as a whole (in Europe 29 % versus 14%, in Canada 25 % versus 16%). It is also growing more quickly. However, most existing or emerging policy instruments for the creative economy obviously assume *regularly employed* artists and creators (with the attached social security benefits) as the normal case since they do not contain specific regulations for self-employed creative workers. Out of 38 Eastern and Western European countries plus Canada and Russia, the majority (22) do not have a comprehensive social security system in place for self-employed artists in place (among them are the UK, Italy, Norway, Sweden Portugal) (www.culturalpolicies.net).

High numbers of self-employment are not the only anomaly of the creative labour force in comparison to other economic sectors. As both the EU and the Canadian statistics demonstrate, creative labourers are not only better educated than the rest of the labour force but earn less than people in other professions who hold university degrees. For example, 47% of creative workers in Europe have post-secondary education compared to just 26% of the overall work force (*The economy of culture in Europe*, 2006, p.88). They also work more often in part-time jobs (see Table 2). The precariousness and insecurity that characterize the work lives of creative labourers are more accurately mirrored in the EU document since it explicitly accounts for temporary employment situations and traces the phenomenon of one person holding multiple jobs at the same time. Contrasting these statistics with the European work force as a whole, the document illustrates that creative labourers both score incomparably high in holding temporary jobs as well as multiple jobs to make a living. However, both official documents fail to map the incredibly diverse and differentiated work styles and employment situations of creative labourers in their entirety.

Furthermore, as Table 2 demonstrates, the myth of the public sector/supported artist is dead in Canada as presented in the official statistics. Most culture-based workers work in the private sector, and apparently just 5% work in the public sector (although since Statistics Canada would count a musician also supported by teaching in the other sector, the important role of post-secondary institutions in supporting cultural workers is suppressed). Yet the contribution of training, arts schools and culture labs is increasingly a focus of the creative industry/cluster economists. The clear conclusion from this imperfect map is that self-driven career work is a mainstay in Canada's cultural field, where artists, dancers and other workers are three times more likely to be self-employed. The incidence is higher in some creative occupations: painters and visual artists, for example, are mostly self-employed (over 67%). Full time employment may be harder to get or strategic underemployment a small price to pay for one's passion.

Table 2: Characteristics of culture workers in Canada (percentages of total work force)

Full Time Culture Workers (average 1996-2002)	78	versus	81	non-Culture
Unemployed Culture Workers (averaged)	6	versus	8	non-Culture
Employed Culture Workers in private sector (averaged)	71	versus	65	
Employed Culture Workers in public sector (averaged)	5	versus	19	
Self-Employed Culture Workers (averaged)	**25**	**versus**	**16**	

Source: *Focus on Culture. Quarterly Bulletin from the Culture Statistics Programme* (2004) Based on 48 occupations classified as cultural workers in the Labour Force Survey.[5]

Income portrait

Highly developed skills, education, versatility and flexibility, then, do not necessarily convert into economic reward, as innovation in art, science and technology demonstrates. Culture workers in Canada post average employment incomes which are lower than other workers' (at around $30,000 in 2000) and incomes grew more slowly (1995-2000). However, relative income growth was *higher* for certain core cultural producers than support occupations, especially accruing to painters, and other visual artists who were the farthest behind, and still remain so. There were no cultural occupations in the top quartile of Canadian earners in 1995 or 2000. Nor are there studies of incidence of artists below low income cut off lines. However, median salary information challenges the image of the underpaid worker, especially in Ottawa Hull and Toronto, and across many of the sub-disciplines. The emerging data suggest that the myth of the starving artist in the atelier also has to be set aside in Canada – the picture is much more stratified and complex than supposed.

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[5] Although it has a large sample size (over 50,000 households), the reliability of the estimates about culture occupations in the Labour Force Survey is limited, as is the occupational breakdown available, and its numbers typically, and predictably, differ from Census estimates. Data from the Labour Force Survey are not cited by many for this reason (Terry Cheney, http://www.culturalhrc.ca/research/CHRC_Cultural_Sector_Fast_Stats_2004-en.pdf).

The Culture Labour Force Survey was a one-time survey addressing a population of about 150,000 people identified as working in creative cultural occupations (visual artists, actors, musicians, etc.) to explore their working conditions, education and training, income and finances. The sample size was just over 5,000. It is more comprehensive than most census or generic Labour Force studies, but has not been replicated and enhanced since.

The highest paid culture-based occupations are architects, producers, directors and choreographers. Workers in performing and visual arts occupations involving creation, such as dancers, artisans, craftspersons, musicians, singers, painters, sculptors, and other visual artists had incomes that were well below average for the cultural labour force (2004). When combined, the median income for cultural workers ($31,149) is close to the Canadian average ($32,123).

Table 3 Comparative Incomes of Cultural Workers in Canada (2000)

Average Cultural Income	$31,149	versus	$32,123 average
Average FT Cultural Income	$40,060	versus	$43,298 average
Average PT Cultural Income	$19,506	versus	$19,067 average

Core Cultural Sector Incomes (Overall)	
Creative and Artistic Production	$28,786
Heritage Collection and Preservation	$34, 639
Management	$49,370
Technical and Operation Occupations	$30, 047
Manufacturing support	$29, 970

Source: *Focus on Culture*, Quarterly Bulletin from the Culture Statistics Programme (2004) Vol 15, No. 2, Table 1.

Interestingly, gender balance is more representative in the cultural occupations. While women cultural workers still make less than their male counterparts, the gap is narrower. Data on visible minorities or breakdown by ethnocultural origin are not available.

Unfortunately, it is not possible to identify comparative degrees of income stratification within Canada, or compared to Europe from the existing data. Yet speculative evidence from qualitative surveys over a decade ago suggests that the more extensive public sector support in Canada – where artists work in arts schools or for public institutions – makes income differences from the general labour force smaller than some countries, like the US.

Certainly, agglomerative effects differ. Montreal is lagging behind other cities when it comes to culture-related jobs, according to a new study released in the summer of 2007 by Statistics Canada. Over a 20-year period, the big growth has been in the West, and, as a result, Montreal has fallen behind in the rankings. Vancouver tops the list with the biggest cultural share of the workforce. Toronto is second, followed by Victoria and then Montréal.[6]

Sharp regional variations thus are commonplace in Canada, and the data on location of cultural workers confirm sharp agglomeration effects. Rural incidence of cultural employment is lower overall than in other sectors, and more likely to be part time, but growing more quickly than other areas, possibly due to displacement/cost of living and other factors in urban areas. Heritage and visual arts workers are much more likely to gravitate to rural areas in Canada. In general, Canada's three largest cities – Toronto, Montreal and Vancouver – lead in the number of cultural workers, accounting for 64% which is much higher than clusters of other workers would seem to suggest. Enrolment in universities, colleges and trade schools for creative professions is also much higher.

Not measured in the full time category is hours of work. Long hours are known to be associated with the creative industries, yet are not regulated in most cultural professions. As mentioned above, also unavailable are poverty or low income cut off rates for cultural workers, important in consideration of underrepresented populations such as aboriginal or other visible minority groups. In their 2002 survey of the cultural sector, the Canadian Human Resources Council's report *Facing the Future* found:

> Creators, performers and cultural workers across all sub-sectors and disciplines are experiencing insecurity and instability in their employment and independent/contract work. The problem manifests in a variety of ways: the decline in available full-time and permanent jobs, the transitoriness [sic] of employment/engagement, the need to secure and balance multiple jobs to make a reasonable living, systemic barriers for the self-employed, the absence of a social safety net, and wholly inadequate remuneration. For individuals in the cultural sector – whether contractual or full-time employees and whether working in the for-profit or not-for-profit sectors – working conditions appear to be very difficult, characterized to a large degree by:
>
> – poverty level pay[7];
> – excessively heavy workloads;
> – lack of full-time work;
> – overwork;
> – high performance expectations despite insufficient training and support;
> – the requirement to multi-function, leading to poorer quality work and crisis management;
> – lack of opportunities for advancement;
> – lack of security and benefits;
> – devaluation by boards, employers, government and the general public;

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[6] Statistics Canada (2004). Census Metropolitan Areas as Culture Clusters. *In Trends and Conditions in Census Metropolitan Areas.* 89-613-MWE.

[7] Documented from qualitative interviews.

The *Facing the Future* study confirmed that creators and cultural workers who are disadvantaged, marginalized or isolated in Canada include:

1. aboriginal and visible minority cultural communities;
2. linguistic minorities, including French outside Québec;
3. the geographically isolated (rural, Northern);
4. workers in smaller organizations and enterprises;
5. youth.

This survey of techniques to map the creative labour sector shows there are serious problems of categorization, given the blurring of practices. Phyllida Shaw in her meta-analysis of research into artists working lives, conducted for the International Federation of Arts Councils and Culture Agencies (2004) suggests amount of time, income and membership should be the main criteria of delineation. Certainly the Canadian Labour Force categories do not capture the complexity of artists' working lives. For example, economist David Throsby's work in Australian occupational mapping has found over 130 categories. In addition, the Australian Council has suggested the Australian labour force survey routinely suppresses about 2/3rd of the creative labour force. In general, countries have found that the information from self-selected professional organizations who survey their own members is more relevant and reliable. Ruth Towse and Summerton (Shaw, 2004) argue that multiple job holding is a choice rather than a compromise for many artists, speaking to an underlying multidisciplinarity in thinking and practice. Few studies pursue the cultural labour market over as long a term as Australia with the work by David Throsby, and few probe underlying issues of choice or time spent in various artistic and other occupations to understand the artistic life-cycle.

While there has been no study of the sociological structure of Canada's creative labour force, it is clear that there are sharp differences in status, training, credentials and the degree of "licensed autonomy" or professional independence obtained – rigidities which are emerging even as there is an increasing "fluidity" in job overlaps and job mobility. Such paradoxes suggest problems in the existing system of creative labour force adjustment. The strong shift away from more traditional to informal forms of employment in the performing arts is felt around the world, including China and the Russian Federation (ILO, 2004). The ILO argues that this major shift in the composition of the sector leads to workers accepting contracts with lower conditions and poorer conditions than in the past. There is an urgent need for comprehensive, in-depth study of cultural workers to identify these and other factors that may present barriers in access to the means of creative expression. As mentioned before, Canada has not had a comprehensive study of its creative workers since 1993, and since that time there has been a sea-change in methodological standards.

Collective organization of Canada's cultural labour force

Similarly, no data yet exist on the degree of collective unionization or membership in professional/disciplinary associations in Canada. However, high levels of formal education compared to other workers suggest either a tendency to self-employment as a mode of work, or to gravitate voluntarily to professional associations or affinity interest groups, which may or may not have formal policies. Certainly, some unions have been more accommodative of the trend in a knowledge-based economy away from hierarchical forms of learning and practice embedded in organization to an intellectual style that is oriented toward speculation, projection, expression and innovation (Christopherson, 2004). Recognition and accreditation of new skills is increasingly problematic for a lone individual negotiating with clients. Other studies of this sector suggest "thick" associative networks are emerging as well as increasingly global links. Uncertain career paths and the need to continually invest in acquiring new skills propel a demand for the formation of these new organizations. Yet evidence from economists like Richard Caves (*Creative Industries*, 2000) continues to suggest a discount factor in such non-union/non-guild labour formations: estimated between 30 to 35% of production costs can be saved by operating a non-union project in film, for example. New cooperation across unionized sectors are increasingly important to bargain against "runaway labour" pressures (in BC's Film Industry, for example). Certainly, the recent strike of the screenwriters guild in the US, combined with rotating strikes of creative workers in France in 2003-2004 or at ITV in 2004 in the UK suggest strike action is a sign of growing disputes over the adjustments of the creative labour economy.

The casual creative labour force in Canada

The creative labour pool is supported by amateurs and volunteers who enable it: termed for this report as the "casual" creative labour force, or understood to be part of the social economy. In Canada, a voluntary participation rate of 3% of all Canadians in arts and culture has been found (placing it 7th ^{in} ranking among likely activities).[8] Arts, heritage and culture volunteers on average donate more of their time: 120 hours a year (or 4th among other sectors like health overall). The projected total in the volunteer cultural work force then is about 782,790 volunteer workers. In short, for every "above the line" full or part time job in the cultural economy there is one "below the line"[9]. The Canadian Cultural Human Resources Council has consistently found a shrinking pool of volunteers since 2000 (*Face of the Future,* 2002, Cheney, 2004).[10] As expected, there are sharply different projections on how to monetize this contribution. The Satellite Account report issued by Statistics Canada values volunteer work overall at $14 billion or 1.4% of the GDP (Catalogue no. 13-015-XIE, 29). Culture and recreation utilised the most volunteers in 2000, representing an estimated value of $3.6 billion in replacement labour costs--more than double the standard estimate of the Cultural GDP-- and accounting for 64% of its total value of labour services (ibid), the *highest* in any core non-profit sector. If the casual voluntary

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[8] See the Canadian 2004 Survey on Giving, Volunteership and Participation (CSGVP).

[9] http://dsp-psd.pwgsc.gc.ca/collection_2007/statcan/13-015-X/13-015-XIE2007000.pdf

[10] The best source is the 4th edition of Statistics Canada's Satellite Account of Nonprofit Institutions and Volunteering (1997-2004). See http://dsp-psd.pwgsc.gc.ca/collection_2007/statcan/13-015-X/13-015-XIE2007000.pdf. It is one of the longest tracked by any nation, based on UN standards. It owes its existence to the Voluntary Sector Initiative begun during the Chrétien period.

workers are included, the cultural sector contributes over $6 billion to the GDP – much larger than traditional figures hint.

The Organizational Context of the Creative/not-for-profit Cultural Enterprise sector[11]

It is widely accepted that one of the main characteristics of the creative economy is that it is characterized by a significant proportion of not-for-profit organizations; most of them small by corporate standards. Canadian scholars of governance have been among the first to adopt the proposition that a crucial factor influencing how well countries respond to globalizing processes is the nature of the relations with civil society actors (Gattinger, 2005). By way of context, it is important to explore how civil society itself is conceptualized, shaped and mobilized in Canada. In a recent review of the Canadian policy system and civil society, Susan Phillips defines a broad and inclusive concept of the voluntary and non-profit sector in Canada as the aggregation of organizations that:

> exist to serve a public benefit, are self-governing, do not distribute any profits to members, and depend to a meaningful degree on volunteers. Membership or involvement in these organizations is not compulsory, and they are independent of, and institutionally distinct from, the formal structures of government and the private sector. Although many voluntary sector organizations rely on paid staff to carry out their work, all depend on volunteers, at least on their boards of directors (Phillips, 2007).

Much of the scope for civil society is created by government. While the overall voluntary sector in Canada is apparently large, it is generally accepted in policy circles that Canada has a relatively *underdeveloped* infrastructure in civil society, largely a result of the peculiarly low value that policy makers, and parts of the voluntary sector, place on infrastructure organizations (Phillips, 2005). Indeed, Canada is one of the few democratic countries in which the peak infrastructure organizations that represent cross-sectoral interests do not receive substantial core funding from either governments or foundations.

Measuring the degree of institutional development in the not-for-profit or voluntary civil society sector around the world presents difficult issues for analysts.[12] There has been limited study of non-profit organizations (NPO) and Civil Society Organizations (CSOs), and even less analysis of the cultural NPOs. Recently, the non-profit organization Americans for the Arts carried out a first-of-its-kind study on the contribution that non-profit arts and cultural institutions make to the economy, coming

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[11] Catherine Murray, 2006. Cultural Diversity and Civil Society in Canada. A Briefing Paper Prepared as a Part of a North American Consultation for the 2nd UNESCO World Cultural Diversity Report.

[12] The International Classification of Nonprofit Organizations (ICNPO) developed by the Johns Hopkins Comparative Nonprofit Sector Project is in wide use. It includes: **Media and communications.** Production and dissemination of information and communications. Includes radio and TV stations; publishing of books, journals, newspapers and newsletters; film production; and libraries; **Visual arts, architecture, ceramic art.** Production, dissemination and display of visual art and architecture. Includes sculpture, photographic societies, painting, drawing, design centres and architectural associations; **Performing arts.** Performing arts centres, companies and associations. Includes theatre, dance, ballet and opera companies; orchestras; and choral and music ensembles; **Historical, literary and humanistic societies.** Promotion and appreciation of the humanities, preservation of historical and cultural artefacts, and commemoration of historical events. Includes historical societies, poetry and literary societies, language associations, reading promotion societies, war memorials; and commemorative funds and associations; **Museums.** General and specialized museums covering art, history, sciences, technology and culture and **Zoos and aquariums.** Includes zoos and aquariums.

up with $29.6 billion US dollars in tax revenues for America, supplying 3.1 million full-time equivalent jobs (*The economic impact of nonprofit arts and culture organizations and their audiences, 2007*)[13].

With the release of Statistics Canada's Satellite Account of Non-profit institutions and Volunteering in 2007, the significance of the contribution of NPOs is slowly becoming more known. Non-profits contribute almost $30 billion to the Canadian GDP – excluding universities, colleges and hospitals – 11% of which (or just over $3 billion) is driven by the culture and recreation sector. That share has remained stable since 1997, showing only small softening.

The comparative benchmark study of this sector comes from another source at Statistics Canada.[14] To begin, the (large) central core of organizations that constitute the Canadian voluntary/nonprofit sector in Canada – estimated to be the 2nd largest in the world – is comprised of over 160,000 organizations of which approximately one in two are charities registered with the Canada Revenue Agency (CRA). This is a status that enables them to issue tax receipts for donations and that makes them subject to federal regulations that no more than 10% of their activities be directed to policy advocacy. These organizations work in a wide array of policy fields, with some 9% or 13,000 organizations in arts and culture, representing a significantly greater number than education or health, but less than social services and considerably less than sports. However, arts and culture CSOs are sharply divided between the very few large organizations and a multitude of very small ones. The study also allows some insight into their activities.

Compared to other sectors of civil society, most arts and culture organizations (55%) direct their activities to local constituencies, 22% to regional ones, 9% to provincial, 3% to national constituencies and the remaining 8% to international ones: the incidence of organizations with international focus is second only to the post-secondary sector, for example. Arts and culture organizations are more likely than others to report problems associated with financial issues, their ability to engage volunteers, difficulty planning for the future and lack of internal capacity as problems. It is not possible to get a breakdown of the proportion of arts and culture organizations representing independent producers, unions, distributors or other stages of the creative cycle of production. Nor is it possible to determine how many are multidisciplinary, how many are coalitions, or what resources and functions they may serve. In addition, there are many hybrid organizations that have characteristics of public or private as well as voluntary sector bodies. For instance, business or labor entities often gather in associations with not-for-profit status.

While overall revenues for all CSOs in 2003 are known to be $3,427 million, arts organizations account for just 3% of all revenues. The average per organization is $248,000 compared to $1.2 million for business or professional organizations. One fifth

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[13] No information on GDP supplied in the study as non-profit contribution is obviously not considered a regular contribution to the GDP.

[14] Statistics Canada (2004). *Cornerstones of Community. Highlights of the National Survey of Nonprofit and Voluntary Organizations.* Catalogue no. 61-533-XIE.

or 21% of the total are younger than 10 years old, suggesting a rate of growth in the not for profit cultural enterprises second only to the environment.

Full counts of the number of creative enterprises are difficult to obtain. CCHRC's *Cultural Sector Fast Stats* (Cheney, 2004)) found 625 performing arts organizations in Canada, for example, and among them, In general, the Heritage sector has been found to have the highest number of creative enterprises (2,300) and one of the best infrastructures for professional organization, training and accreditation. Yet just 15% of its 70,000 workforce was fulltime, facing it with enormous transaction costs in coordinating a volunteer workforce with high turnover.

Qualitatively, even less is known about these organizations and their human resource policies, internal allocation of resources, or policies with respect to research and development. The one exception is the new media sector which has attracted interest in the study of clusters of innovation in Canada (Gertler, 2005). CHRC's *2002 Face to the Future* identified the following issues from a qualitative survey of over 180 managers, owners and professionals in the core creative sector:

1. The 'weak' culture of human resources
2. Lack of awareness of structural change in the economy
3. Employment status
4. Recruitment and retention
5. Access to training
6. Demand for new competencies

The sector also shares with most of the economy concerns relating to:

- aging workforce and especially a trend away from cultural occupations amongst youth;
- an aging marketplace; and softening of patterns of volunteer participation;
- an increasingly diverse population and lower employment rates among visible minorities in culture-based occupations;
- the presence of global markets;
- global competition; and
- strong impacts of digital technology.

How do these enterprises, then, respond with services to aid their members to meet these challenges? Many in traditional disciplines, and particularly those registered as charities, start out with a primary mission to provide services. However, less well understood is *how* many provide services (and of what type) to their members (eg. the Director's Guild which provides a pension plan for its members), or resources such as an information clearing house (for example, one service provided by the Alliance for Arts and Culture in Vancouver) or additional environmental scanning or policy analysis (for example, the Creative Cities Network for municipal cultural planners).[15]

[15] A range of services for members may include: Accounting services. Audio and web conferencing, E-

Anecdotal evidence suggests most of these organizations can provide no benefits, or pension or other packages above the minimum statutory requirements for the workers they represent. For the average actor in Quebec, who was able to get 9 weeks work, it would be difficult to be eligible for unemployment insurance from either the state or from the local guild.

One final dimension of organizational development is policy capacity. There may be several levels of participation in policy: monitoring, news services, information brokering, consultation, independent research, and policy analysis. An important factor is to assess is capacity for creative enterprises to monitor, participate in or formulate public policies. There is no survey of the number of positions earmarked for policy coordination among cultural organizations. The position of a government relations officer or policy analyst is usually either grafted onto the role of the executive director (as it is in the CFTPA, for example) or added as an after thought. A recent survey of Canadian voluntary organizations working in health, which include some of the better resourced and most policy conscious organizations in the sector, attests to the limited human resources dedicated to policy work. Only 16 percent of provincial and national health organizations had paid staff devoted to policy development or government relations (Phillips, 2007). The incidence is likely much lower in culture. We can conclude that many NPOs of the arts and culture sector thus have little or no capacity to participate in intensive policy monitoring or independent public policy analysis and therefore are unlikely to be of direct relevance to any empirical discussion on the cultural economy.

The nature of the creative enterprise

The turn to a policy preoccupation with creative economy has focused at the private enterprise level, and attracted growing attention to start up, cluster and innovation policy subfields (*Quick Scan of National Policies for Creative Industry,* 2007). Increasingly, policy regimes are paying critical attention to the organizational capacity of creative enterprises to develop typologies of services from them needed (ranging from inspiration and influence to support and guidance to access to markets to peer learning). Such “needs” driven service portfolios begin with surveys of the micro-enterprises, design services for them, and involve them in the evaluation of the design. Business service centers set up for the new economy in general are increasingly providing advice and information about start-ups. The Canada-Ontario Business Centre, for example has an Arts and Artists Info Guide which, like Sodec’s is unique across Canada.

The major focus among countries with any sort of policy framework on the creative economy seems to be on fostering entrepreneurialism and new business start ups, and especially addressing the gap between invention and creation and the rate of

commerce products. E-philanthropy tools. Group insurance benefits. Merchant credit card rates. Bulk rates for Office supplies. Promotional materials are just several of those that may be offered.

conversion of ideas into tangible, commodifiable assets. The review of Nordic policies[16] is the best at summarizing the mix of structural and cultural barriers to growth that include supply and demand side factors:

- Supply-side: Underdeveloped entrepreneurial and management skills, insufficient knowledge of intellectual property issues (and thus diminished confidence), weak supply chains (inside and outside the Creative Industries), and a degree of failure in the finance/investment market for early stage and small creative firms
- Demand-side: Under-exploited local markets for creative goods and services, not least for firms across the wider economy; and under-developed Creative Industries export markets. In addition, labour market demand – to live and work in the Creative Industries of the Nordic Region – is far less than in those 'global creative capitals' such as London and New York, or global creative regions such as California.

Remedies highlighted tend to include business acceleration models, targeted investment, and specialist intellectual property services, as a key means to grow creative businesses. The focus is on building out the existing support structure, much of which is locally oriented, to broker a coherent and connected landscape of support across economic regions. The Creative Policy Map (see Appendix B) from the Nordic green paper on the creative economy is a typical and elegant example of such an approach.

Interestingly, there is fragmented attention to the human resource policies of such creative enterprises in all except the business press. New awards for "best employers" or other such status are entering into the promotional lexicon of entrepreneurship, changing the nature of how people think about managing creative workers. While the trend to interdisciplinary innovation teams within firms appears to broaden the ambit for the participation of artists or other of the core disciplines in innovation and design in business, this study has turned up little systematic evaluation of how the changing nature of creative work is affecting the creative enterprise. But interest is growing.

Finally, an excellent quick scan of national policies produced by the European Institute for Comparative Urban Research at the Erasmus University Rotterdam confirms the Nordic finding (2007), arguing the universal oversight in many countries is the inability to broker larger pools of venture capital, or better interface between financial institutions and investment in pre-market innovation, or the early stages of creative development.

Conclusion

In this paper, we have highlighted that the statistical tools to map the creative labour force are inadequate in Canada and around the world – which has, of course, consequences for the policies imagined by states and regions interested in the creative economy. For example, regular employment as well as self-employment in the creative sector is included in statistics – but there is no acknowledgement of self-employed workers in policies based on these statistical categories (at least, not as far as social security policies are concerned). Moreover, creative labourers who hold multiple jobs or those who earn more from a non-cultural occupation than from a cultural one do not yet have a place most statistics. Thus, the incredible diversity and

[16] See A Creative economy green paper for the Nordic Region (2007).

also the precariousness of life and work styles typical for the creative labour force are not taken into account.

In addition, the frequently informal and unstable employment situations of creative workers result in difficulties when it comes to unionization and collective bargaining which have not yet been addressed holistically by policy-makers. Another problematic one encounters when mapping creative labour through available studies is the exclusion of the casual labour force. Thus, the considerable contribution of those voluntary or amateur workers to the creative economy is not recognized.

Furthermore, a significant number of creative enterprises are not-for-profit organizations and the general lack of knowledge about the non-profit-sector makes it challenging to assess the organizational capacities of cultural non-profit enterprises, especially with respect to the services (such as pension benefits) they offer to their members, financial stability, and policy development and interventions.

Overall, our mapping of the creative labour force suggests that a more comprehensive approach to policy-making is required to acknowledge the unique challenges that creative workers in Canada and elsewhere face today.