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From Economy to Ecology: A Policy Framework for Creative Labour

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Executive summary

Many countries and regions are increasingly interested in the “creative economy” or, alternatively, the narrower “creative industries” sector as a generator of economic growth. The creative economy is defined to include activities which are based on the original expression of an idea and economic or gift transaction of intellectual property held in private or in common.

The study of the creative economy requires a new understanding of risk, innovation, cultural entrepreneurship, public infrastructure and creative work to enable and sustain economic growth. For example, in Canada the cultural growth rate was over 30% (*Economic contribution of culture in Canada*, 2004, p.10) between 1996 and 2001 and in Europe 20% between 1999 and 2003 (*The economy of culture in Europe*, 2006, p.6). Thus, the creative economy is growing faster than many other sectors. In Canada and many European countries, the creative sector employs between 3-4 per cent of the working population and contributes similar percentages to the annual GDP, placing it ahead of many primary resource sectors (forestry, fishing) combined.

This study was conducted by SFU’s Center for Policy Studies on Culture and Communities (supported by Infrastructure Canada) in partnership with the Canadian Conference of the Arts. Mirjam Gollmitzer, an international PhD Student from Germany and SFU Professor Catherine Murray explore current policy approaches directed at the creative economy, in Canada and internationally, including academic literature, cultural statistics and policy papers.

They find that few countries have a comprehensive policy framework for the creative economy, and Canada is no exception. Despite the general assumption that the creative economy will produce a more flexible, multi-skilled and mobile labour force which is increasingly self-employed and thus resembling the cultural sector in its core characteristics, most countries (with the possible exception of the Nordic region) have not yet developed an integrated conception of creative labour policy. Semi-permanent work groups, temporary jobs and free lancing for multiple employers at the same time and over the creative career life span are now the general rule.

A review of 20 countries active in policies to build creative labour forces alongside policies to stimulate innovation and creative enterprise, finds existing policy instruments can be divided into four categories: “education and training”, “awards and contests”, “business support” and “tax and social security policies” with most of the emphasis on the former. After looking at special efforts to establish the economic rights of artists, the authors conclude a broader approach to “flexicurity” – that is social security for the self - employed flexible labour force – is a key driver of creative innovation.

A review of the strengths and weaknesses of Canada’s creative labour force reveals a new “sociality” in informal, networked cultures of creative production – potentially acting as a double edged sword: contributing to both stability and instability. A gap between classes of creative workers is found. Sharp differences in status, training, credentials and the degree of professional independence obtained by various categories of creative workers exist. Most at risk are youth, aboriginal and visible minorities and those in rural areas. Nonetheless, there are important innovations in collective bargaining and resources made available to creative workers (including advice on standard minimums in negotiations concerning copyright payments).

The researchers offer several recommendations for policy-makers. First, the current official cultural statistics are inadequate to measure the incredible diversity of employment situations specific to creative workers in the new economy. These statistics systematically under-represent the contribution of creative workers to the GDP by anywhere between a half to a third. The last comprehensive survey of the sector was done in 1993 and needs urgent updating. Second, the role of the social economy – the non-profit and voluntary sectors – is important to include in estimating the value added by creative activities, and the capacity of those non-profit organizations which service creative workers. Third, a broader policy framework called a “creative ecology” approach is needed, drawing from the urban planning conceptions of the “creative city” and new thinking about the role of public and private cultural infrastructure in providing the environment in which creativity can flourish. Lastly, there is an urgent need for governments to examine multiple ways to enhance social security and income support for the most important but frequently forgotten component of the creative economy: the creative workers. Social security is paramount for them to maintain their creative edge, and contribute to a healthy diversity in creative expression. What is needed is an entire change of creativity governance, away from the attention on the individual to collective creativity and its interactions. The goal is a theoretically and practically elegant integration of culture and the economy in policy practice.

Preface

The Canadian Conference of the Arts approached the Centre for Policy Studies on Culture and Communities in February of 2008 to conduct a background study on principal thinking about the Creative Economy. The intention is to contribute to the debate on ideas about the *Creative Economy* in the first roundtable about it conducted in Canada by the Conference Board of Canada (March 2008). For ease of reference, this study is presented in three Parts:

Part One: A Review of Basic Concepts

Part Two: A Mapping of the Creative Labour Force and Enterprises in Canada

Part Three: Policy Approaches to Creative Labour

This study represents a survey of the principal known statistical sources, policy reviews and databases on the cultural economy available publicly on the Internet, and is deeply indebted to the work being done by the Council of Europe and the European Institute for Comparative Cultural Research in their annual compendium of sources (www.culturalpolicies.net). The authors are also indebted to the comments of Guillaume Sirois and Keith Kelly in the development of their thinking. Mirjam Gollmitzer is an international PhD Candidate in the School of Communication at Simon Fraser University, and Research Associate with the Centre for Policy Studies in Culture and Communities (http;//www.cultureandcommunities.ca). Catherine Murray is a Professor and Associate Director of the Centre.

Abstract for this study

Creativity functions as an important leitmotif in thinking about the creative economy. However, economic arguments about the specificity of cultural value and its difference from economic value (Caves, 2000; Hesmondhalgh, 2007; Throsby, 2001) or about the role of the arts, artists and the economic activities of the professional arts are not well grounded in theories of innovation or creative industry policy formulations. This article accepts that the most important postulate in the creative economy is that it is based on the realization of the original expression of an idea, an economic or gift transaction of intellectual property – which may be held in private or in common. Understanding the creative process of invention and expression, then, stemming from the individual artist, entrepreneur, or company, is central to effective policy in guiding the creative economy.

An argument is made that the concentric circles model of the creative industry classification based on David Throsby's work (2001) presents the origin and diffusion of creative ideas in sound, text and image as the creative arts (and is most compatible with a new industrial framework for the creative economy). Given the distinct attributes of cultural production, commodity and exchange over time, it is important to understand the role of risk, innovation, cultural entrepreneurship, public infrastructure and volunteer or casual labour support in sustaining creative professional innovation, and enabling its contribution to sustainable economic growth. A comparison of policies to promote creative labour expression in several countries reveals a need for more substance, method and critique.

Despite the general assumption that the knowledge economy will produce a labour force which resembles the cultural sector in its core characteristics, most countries have not yet introduced comprehensive creative labour policies to accommodate a more flexible, mobile workforce, and one which is increasingly self-employed. Several policy recommendations to address this gap are made, consistent with an integrated conception of the creative cultural ecology, derived from urban planning and the study of global cities. What is needed is an entire change of creativity governance, and shift to "flexicurity" in a labour strategy, which acknowledges the interaction with the social economy and volunteer sector. These policies should be developed on the basis of need, requiring more sophisticated models of the creative labour force. A creative labour force survey is urgently needed to develop them.

Part I: Definitions and models of the creative economy

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Abstract

This paper illustrates that many countries and regions are increasingly interested in the creative economy as a generator of economic growth. Canada is a late adopter of the concept of at the federal level. During the past years, a steadily growing number of policy papers have been published by governments around the world, exploring ways to conceptualize this fairly new economic sector, its future potential and adequate policy instruments to promote it (see Appendix A). Thus, there is no shortage of interest or ideas related to the creative economy. However, policy-makers seem to be, most of all, concerned with the question of how to profit from the creative industries *economically* and how do so fast. Such an approach often seems very abstract. It conceptualizes the creative economy as if it was a thing in itself, a collection of creative products and services detached from the human beings who create, produce, distribute and consume them. We suggest, instead, that long-term planning is necessary as much as an exploration of the *environment* in which tangible economic value emerges and the question by *whom* it is created. Such a comprehensive, holistic approach is required for an effective and sustainable promotion of the creative economy. To put it simply, we would like to embed the notion of the creative economy in the actual, everyday world of life and work. Such an approach entails moving from a creative *economy* concept – implying an abstract and at the same time limited notion of creative products and services – to one of a creative *ecology* which looks at those who “make” these products and services: the members of the creative labour force. This is, however, a challenging undertaking since there is a huge gap concerning systematic knowledge about creative labour.

Definitions and different models of the creative economy

The creative economy is considered one of the fastest growing sectors of the economy in many Western industrialized countries, employing around 3-4 per cent of the working population and contributing a similar percentage to the annual GDP[1] (*The economy of culture in Europe*, 2006; *Creative industries mapping document*, 2001; *Economic contribution of culture in Canada*, 2004). Thus, the creative economy earns national economies as much as or even more than fisheries, forestry and agriculture together. However, researchers, economists and policy analysts interested in the creative economy can only dream of the definitional clarity that characterizes other primary sectors. There may be no other sector of the economy that is more elusive, more difficult to “measure” and more plagued by tensions than the creative economy.

[1]Methodologically, this is interesting as it implies a close correlation between employment and contribution to GDP (except in in the UK, where a recent EU comparison found higher productivity: 5% of the labour force generates 8% of the GDP). Data are not easily comparable. However, they are sufficient to support two broad generalizations: there are sharply regional variations in cultural employment within countries, showing strong agglomeration effects in big cities; and apparent differences in relative productivity. For example, contribution to GDP varies given the national variations in composition of the creative economy in capital intensive industries such as film, for example.

First, in an effort to establish terms and categories for an analysis of the creative economy, we need to distinguish the “creative” or “cultural” turn in the economy as a whole from specific creativity-related economic fields. In brief, the transition from manufacturing to service economies in Western industrialized countries has led to an emphasis on the creation, marketing, distribution and transaction of symbolic instead of material value. The focus is on the productive role of meaning and design of products and services instead of products themselves in the generation of sustainable economic growth. Since symbolic value is realized through the attribution of authorship, patent or mark, intellectual property rights become the linchpin of these transformed economies. Intellectual property rights represent the unique expression of an idea which may convey a monopoly or collective licence for reproduction of a work for a period of time in a given space.

One of the tangible consequences of the shift in the general economy from material to symbolic value is the accumulation of profit. Evidence may be found in budgets of branding and marketing departments within companies which are seen to increase while manufacturing is outsourced and/or re-located to developing countries. This major shift is also mirrored in the experience of workers and employees in all sectors of the economy who find themselves in working conditions now largely similar to the way artists and creative labourers have always lived and worked. This experience includes higher levels of self-employment, serial project work and casual labour, job insecurity and precariousness, high levels of expected flexibility, the “de-professionalization” or “re-professionalization” of work with all its blessings of autonomy and burdens, and constant need for life-long learning. Thus, the argument of this paper is that the significance of arts and creative activities today lies in their being a seismograph that predicts larger disruptions, opportunities and developments in the world of work and in society as a whole.

While there has been a significant literature around the economics of the “cultural industries” and “arts” dating from the 1930s, it is only since the growing focus on the role of science and technology in propelling innovation in the economy in the 1990s that we see a transition in policy focus from the “old” cultural industries, to the “new” which involve interactive software and the internet. The convergence of digital techniques of creation, dissemination and storage has precipitated fundamental challenges to traditional business models. For example, the advent of peer-to-peer file sharing revolutionized the distribution of sound recording. Also, the blurring of boundaries between film and video games and other formerly separate forms of content required the involved cultural industries to rethink core strategies for producing and selling their products.

Historically, Tony Blair’s Labour government in 1997 was the first to develop “creative industries” as a term for the “new” cultural industries and as an explicit area of policy-making, exploring a broader field definition and its potential for job creation and economic growth. Since then, more governments in Western and also in Asian countries have come forth with initiatives researching the creative economy. It is fair to say that the UK (*Creative industries mapping document*, 1998 and 2001) and Australia (*Creative cluster study*, 2003) are leaders in the advancement and promotion of creative economy thinking. Several European countries, Europe as a region as well as cities and states in Asia have also launched initiatives explicitly dedicated to exploring the creative economy.[2]

In policy papers discussing the creative economy, "creativity" is not explicitly defined. Rarely is it considered separate from the terms "industry" or "economy". One very recent example is the latest creative industries policy paper by the UK government (February 2008). It describes the goal of its newly introduced arts education initiative as providing "our creative industries with an unrivalled pool of creative talent" (*Creative Britain. New talents for the New Economy*, p.6*).* However, besides the predominantly instrumental use of the term – preoccupied with policy questions about how does creativity benefit the economy? – a more complex and inclusive understanding of creativity can be traced. This more nuanced view of creativity can mostly be found in relation to creative clusters and creative cities (for example, in the green paper mapping the *Creative economy of the Nordic counties,* 2007). Mainly, it consists of reflections on the role that a creative environment – access to cultural infrastructure, cultural spaces (or incubators), associated lifestyle amenities and a multicultural, open atmosphere – might play in attracting creative labourers to certain places to "kick start" the agglomeration of creative industry clusters.[3]

Two intertwined discourses prevail in emerging policy papers. On the one hand, the term "creativity" is used as a brand that fashionably marks regions, nations or cities as modern and "cool", the most famous example being the UK's aspiration to become the "world's creative hub" (Schlesinger, 2007; www.culture.gov.uk). On the other hand, a neo-liberal, economically oriented rationale conceptualizes policies for creative industries rather narrowly as the facilitation of business or the expansion of trade in "edutainment" (Schlesinger, 2007; Cunningham, 2005; Hartley, 2005). A more nuanced perspective on creativity is needed. Creativity is as a complex human force that requires a degree of autonomy and indeterminacy in order to function as a value-adding tool in economic and cultural contexts. Such a more holistic view could result in more pro-active state interventions but such a perspective is rare (Crossick, 2006). Consequentially, the policy initiatives and instruments that are directed at the creative economy heavily draw on mainstream economic policies and less on traditional arts policy or instruments specifically tailored to the creative industries.

[2] Official documents assessing the creative economy exist in Denmark, Germany, Austria, Australia, Singapore, New Zealand, for the region of Catalonia in Spain, the Netherlands, and for the region of Flanders in Belgium, the European Union and in Canada. All mapping documents are recent, dating from the year 2000 or later (see Appendix A for details).

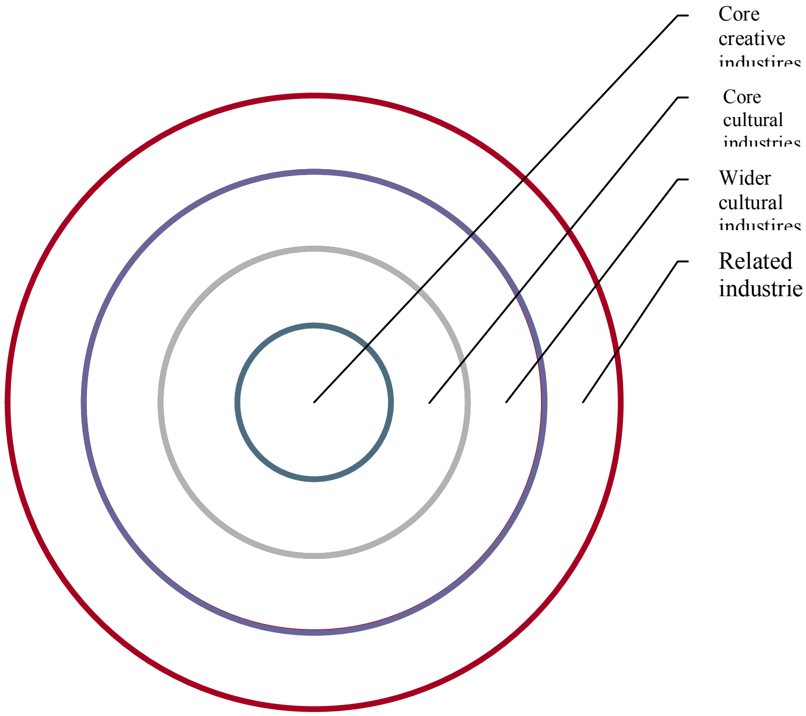
[3] Project work is a temporary labour system constituted among individuals rather than firms, which may resemble or differ from other forms of flexible production rooted in networks or firm clusters. It is generally accepted that there remains a spatial dimension to project work as it is presented in new media industries, for example, despite the virtual possibilities of the field. Reasons may flow from the transaction-intensive nature of serial projects, the need for creative stimuli, and access to specialized training. See Susan Christopherson (2004).

The issue of domain boundary

This brings us, finally, to the question which economic domains the creative economy is composed of. The answer to this question determines the types of policies that are suggested and pursued. For example, the UK Department of Culture, Media and Sport lists design, film and video, television, antique markets, computer services, advertising, architecture, performing arts, and crafts as industries whose intellectual property rights can be exploited. The World Intellectual Property Organization (WIPO), using a similar rationale, defines the creative economy as industries that are involved in copyrighted work; the UNESCO looks at cultural goods and services that enter international trade. However, for the purpose of making policy recommendations, models that stress only one particular aspect of the creative economy or those that just enumerate different industries and disciplines without grouping them into categories are not very useful. Rather, we look at models that offer a classification of the various sectors within the creative economy.

In these models, the term “creative economy” in general includes the arts as a non - or semi-commercial undertaking as well as industrialized forms of creativity which are termed “cultural industries” or “creative industries”. What counts as “creative industry” is not commonly agreed upon and has fundamental consequences for the economic significance, expressed in employment numbers and GDP, of the creative economy. For example, the inclusion of software development, research and development departments or the toys and games industry considerably increases the market size of the creative economy in relation to other economic sectors. At the same time, these inclusions make traditional arts a minor player within the creative economy. Often heritage is completely excluded from the creative economy sector: a position which is logically absurd, given the importance of trade in cultural artefacts. Another crucial question is how the direction of the flow of creativity – as a value-adding process – between traditional arts and cultural industries is conceptualized. One way to do this is to put the “pure” performing and visual arts at the center of a model of the creative economy, considering it the origin of creativity as the cultural economist David Throsby has done in his concentric circles model (see Figure 1 below).

Figure 1: Concentric circles model of the creative industries[4]



Core creative arts	**Core cultural industries**
literature, music	film
performing arts	museums
visual arts	libraries

Wider cultural industries	**Related Industries**
heritage services	architecture
publishing	advertising
sound recording	design
television and radio	fashion
video and computer games	

[4] Figure created with reference to Throsby (2001, p. 112) and Flew (2002, p. 135).

With several modifications tightening the idea of culture as a creative input on non-cultural products, this model is identical to that adopted by a recent review of national policies for creative industries, mostly in Europe, and by a policy recommendations paper for the Northern European countries (*A creative economy green paper for the Nordic region*, 2007, p.14; *Quick scan of national policies*, p.8). Throsby's model is not without resistance (Flew, 2002) for its whiff of old "elitist" arts policy setting out the hierarchy of disciplines. Yet, authors in agreement with Throsby argue that without the initial story, libretto, or conception of the image, no audio-visual product can be made. Consider the case of process innovation. While there has been a tendency to format TV trade which copyrights a production concept and process (and not the particular creative expression of it) ; that format is still initially written, conceived and trademarked in a way where the originating discipline (in this case, writers) is causal. In other words, by using the convention of creative expression as a process of formulation, fixation and additive value, inevitably the core disciplines of art are inputs in later complex forms of industry organization.[5]

Diametrically opposed to this view would be a model that pushes the traditional arts to the periphery or to an autonomous parallel sphere while regarding all commercially produced culture – such as traditional and new media industries, music companies, advertising and marketing – as the heart of a creative economy model (Hesmondhalgh, 2007). While the latter constitutes an important starting point for a creative economy concept that combines creativity and economic power, the concentric circles model seems to include traditional arts policy approaches. Yet there is a problem in ascribing solely non-industrial attributes to the performing arts, or conceptualizing the concentric rings as Throsby appears to do. As the reinvention of the music business model is proving, concerts and live performances (considered at the centre of Throsby's concentric circles) now play an important role in mediating demand for purchases of on-line music (or the second and third rings), and present more classic attributes of product marketing. Thus, the different circles should be conceptualized as permeable as well as allowing for flexibility in succession. Another way to structure and diversify our thinking about policies for the creative economy is by referring to the different "stages" in the value chain of creative goods and services. This model roughly corresponds to the rings of Throsby's model in that the "initial creation" stage corresponds to the core ring. The second and third rings can each be related to both the production and the performance/distribution stages. However, the fourth circle (related industries) does not correspond to the consumption/co-creation stage in the cultural value chain.

[5] Caves' (2000) argument about simple and complex models of cultural production also confirms Throsby's premise.

Figure 2: Cultural value chain

Initial creation | tangible production | performance/distribution | consumption/co-creation

The value chain might be a good concept for tackling the false dichotomy between "pure" and "industrialized" art and culture suggested above – by simply seeing them as *different* steps in *one* process of pre-commercial, commercial and post-commercial creative labour within each ring of the concentric circles model, each adding value to the product. The further we move away from the initial creation and step deeper into commodification, many critics argue that the economic value increases while the artistic value is watered down. However, the consumer is increasingly enabled to engage actively and interactively with the product and "steps in" towards the end of the process to bring in new creativity. Whatever the conceptual debates over the models of the creative economy, the key postulate which is widely accepted is that, while processes of cultural valuation and economic valuation are different, they are interpenetrated and mutually dependent (Grant & Wood, 2004, p. 44-45; Throsby, 2001).

Apart from the question which domain should be at the center of a concept of the creative economy, "radiating" outwards to other, "less creative" domains, another problem is to know where the influence of creativity ends, or where creativity may be "dense" or "intensified" and where it is "diffuse" or "partial". Here, we come back to the tension between the arts in a narrower sense and creativity as a phenomenon permeating the economy as a whole, including the private and public sectors as well as the not-for-profit economy. In this, the WIPO copyright model separating core copyright industries (treating visual and performing arts and music as commensurate with film and video or Television) is useful in identifying levels of title originality, and separating logically origination, adaptation and performance. WIPO notes the role of interdependent copyright industries (as inputs or outputs) and "partial" copyright industries, such as design and architecture in the domain. The aggressively expansive definition of the domain used by the UK government (see page 5 of this paper) is thus premature. It neither accounts for distinction between intense intellectual property production (primary and secondary sectors or invention, adaptation and mimesis), nor differences in the respective value chains of the sub-sectors. Perhaps most importantly, it completely excludes the heritage sub-sector, and blurs audio visual sectors like new media with manifest aesthetic content with other software applications.

For pragmatic reasons and with an eye on policy recommendations, we should firmly establish the creative economy as a separate, unique sector of the economy. To do so, we need to broaden existing conceptions of the creative economy – namely with respect to the *economy* – while at the same time narrowing them down, namely with respect to *creativity*. We have just rejected the UK government's official definition because of its *expansive inclusion of too many disciplines and sectors* from architecture to software under the rubric "creative". The UK's further definition of creative industries – described as "industries that are based on individual creativity, skill and talent" and having "the potential to create wealth and jobs through developing intellectual property" (*Creative industries mapping document*, 1998) helps us to illustrate where we would like to see the definition *broadened*. We need to expand on this conventional understanding of the economy as private commercial transactions exclusively aimed at generating revenue and include the public sector, public-private partnerships and the social economy in our reflections on the relationship between creative expression and economic value. The social economy consists of a wide range of voluntary, not-for-profit activities of entrepreneurs and artists.

Returning to the term "creativity", we do not use it to refer to a principle that increasingly conditions all activities in the world of work. Seeing the creative economy as embedded in the knowledge economy and the information society but different from both, helps us to develop a tailor-made set of indicators to monitor its growth and a basis for developing effective policies. We limit ourselves in this paper to those economic activities that involve the adaptation of symbolic texts (broadly defined as texts, images, and sound), the promotion of these texts and issues of design. Here the Conference Board of Canada's narrow definition of the *cultural industries* for its first policy roundtable in March 2008 is a useful starting point. These industries are viewed as "book, periodical, and newspaper publishing, sound recording, radio and television broadcasting; interactive media (video games, online museums, e-learning with cultural content)" (www.conferenceboard.ca). However, we would like to broaden the Conference Board's conception of the *arts*, defined as "performing arts, visual arts, and festivals" to include heritage (museums, galleries and libraries) arts schools and services.

Looking back at our notions of "creativity" and "economy", we can say that the challenge is how to wed social capital formation and notions of collective creative security with the dynamism of the creative economy (Flew, 2002, p.355). To achieve this, a broader concept is needed. However, we would like to first explore the size of the creative sector to point out its growing significance.

Sizing the creative economy sector

Comparative data is difficult to find because countries and regions have varying understandings of which sectors and jobs belong to the creative economy. For example, the EU measures cultural employment by including not only people who perform a cultural function within the cultural sector – which is the more exclusive Canadian approach – but also those who work culturally in other sectors of the economy as well as those who work in the cultural sector but whose jobs are not cultural or creative at all (*Economic contribution of culture in Canada*, 2004, p.15, *The economy of culture in Europe*, 2006, p.73).

In 2002, GDP from culture activities consonant with the Conference Board's narrow definition of the sector amounted to more than $39 billion in Canada, an increase of 31.7% from 1996, exceeding the overall growth in the Canadian economy and accounting for some 3.8% of the GDP in 2002 (*Economic contribution of culture in Canada*, 2004, p.10). This growth rate appears higher than that in the European Union, with slightly less than 20% between 1999 and 2003 (*The economy of culture in Europe*, 2006, p.6). The European-wide contribution was only 2.6% to the GDP in 2003 but many individual European countries such as France, UK, Norway, Finland, Denmark all have numbers higher than 3% (ibd., p.66).

Table 1 Comparing amount of jobs and contribution to GDP to overall economy (time frames: 1999-2001 for Canadian numbers, 1999-2003 for EU and European national numbers)

	Jobs %	GDP %
Canada	3.9	3.8[6]
European Union	3.1	2.6
Germany	3.2 (including cultural tourism)	2.5
France	2.5 (incl. cult. tourism)	3.4
United Kingdom	3.8 (incl. cult. tourism)	3.0

Sources: *The economy of culture in Europe* 2006 (p.67, 81), *Economic contribution of culture in Canada* 2004, (p.6)

Creative economy or creative ecology?

The creative (or, to use an older term: cultural) industry concept of the 1990s has widened to the creative economy (Howkins, 2001, Leadbetter, 2000, Florida, 2002) and now to creative regions and creative cities under the influence of microeconomics and innovation system theory. Theorists like Charles Landry (2000) (the inventor of Helsinki's Festival of Light) and others of the urban planning and cultural geography disciplines explore how technological innovation arises from a cultural and institutional urban milieu that promotes innovation and experimentation: the location, if you will, of the learning economy on the ground (Flew, 2005). The creative milieu is defined as a "shared space and tradition in which people can learn, compare, compete and collaborate and through which ideas can be proposed, developed or disseminated". The "creative cities" movement is heavily European, but has early adopters in the Creative City Network of Canada (established in 1998) and supported by programs of the Department of Canadian Heritage like Creative Spaces Canada. The movement is about re-imagining local urban space within a competitive global framework (Pratt, 1994) and often the

6 Arguably, if you broaden the definition of culture to include leisure, sport and cultural tourism, the contribution to the GDP can rise as high as $54 billion (Culture and Leisure, www.41.stacan.ca/2007/3955/ceb3955_000_e_htm)

capacity to attract and generate employment and output in the creative industries (Sassen, 2005), refuting the “death of distance” or focal fade away from “face to face” synergies in creative production processes. It may even be said that the cultural district or quarter in new urban geography originated the “clusters” concept in the study of new production networks, and casts the distinctive style, sound or look for which a city can become known[7]. While “cool Brittania” foundered in Britain in short order, Singaporean initiatives like the “Renaissance City” or the UAE’s Masdar persist.

Policy literature seems to accept that creative cities require a cohesive policy framework set within the cultural context to allow the fruition of creativity (Robinson, 2006; Landry, 2005). Like Throsby, cultural geographers spatially map the city in series of concentric circles, often determined by property prices, high value added services like finance, cultural institutions and the headquarters of cultural industry organizations collocated around a contemporary version of the piazza or village square. Anchors to such a square or district often include a market or restaurant, a public library, art gallery or museum, a major theatre or film studio. Around it is the “buzz” ring of creative services, and related creative industries which include advertising or promotion, design, multi-media entrepreneurs, artists and small galleries. Also, experimenting with “creative enterprise zones” to sustain sites of incubation at below market value to ensure the subsistence artists and ateliers that comprise “the soul” of culture, continues to remain a part of the mix (Landry, 2005).

Urbanscapes require a fundamental shift in thinking away from physical infrastructure towards urban dynamics and the overall health and well being of its peoples, a shift in which Landry sees the city as an organism. He elaborates:

> The creative city approach, therefore, does not look at policy sectorally. Its purpose is to see how the pool of cultural resources identified can contribute to the integrated development of a locality. By placing cultural resources at the centre of policy-making, interactive and synergistic relationships are established between these resources and any type of public policy – in fields ranging from economic development to housing, health, education, social services, tourism, urban planning, architecture, townscape design and cultural policy itself. Policy makers in all fields should not simply be making instrumental use of culture as a tool for achieving non-cultural goals. (Landry, 2000, p.175).

Quite simply, the creative industries need to mobilize cultural and economic arguments in the context of a city culture, equally a product of a division of labour and an imaginative work (O’Connor, 2005). Thus, what is needed is a holistic, integrated approach to creativity.[8] Such an integrated approach is often called “ecological”. A cultural ecology recognizes that the notion of creative industries broadens the social base of enterprise culture, characterized predominantly by:

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[7] David Hesmondalgh and Andy Pratt applaud Hans Mommass for his critique of the creative city discourses about place marketing, entrepreneurialism, innovation, regeneration of derelict buildings, and stimulating cultural diversity and democracy.

[8] Landry, borrowing from Matarasso, suggests a sensible scale for assessing the creative city policy capacity which can easily be adapted to national systems (2000, p.234-235).

- creative individuals and entrepreneurs
- small to medium enterprises
- pre-commercial (or anti commercial activities) as well as commercial activities
- new mixes of public and private partnership
- a complex web of social and cultural infrastructure
- local and global production flows.

A cultural ecology approach presents a complex challenge in cultural policy governance. A country taking the creative turn requires focused and tremendous efforts in terms of coordination between and among highly decentralised agencies and in seeking resources. Developing the creative infrastructure in its broadest sense requires the cooperation of many stakeholders (Roodhouse et al., 2004). The case for a creative ecology approach becomes all the more persuasive as the following discussion of creative work will make clear. Sub-sector boundaries are blurring and unstable. The nature of the work force is changing. It is thus all the more necessary and productive to adopt a more broad-based approach to the development of the creative economy sector as a whole as opposed to a reductive, specialized one (*Facing the Future*, 2002).

Creativity and Work

While there has been extensive attention to the economic theory of the new creative economy in academic and policy circles, much less attention has been paid to the changing processes of creative work. It is generally accepted that the creative practices of creative industries now involve more interactivity, hybridization, new sites and forms of production, multiplatform delivery, promotional synergy, and more serial project entrepreneurship. Yet a recent quick scan of over 1000 policies in 18 countries conducted by the European Institute for Comparative Urban Research (*Quick scan of national policies*, 2007) detailed no creative labour policies aside from support for entrepreneurship. However, there is a growing awareness of the need to adapt general and specific labour policies in the new economy.

The experience of people working in the *creative* industries today is conceptualized most often around the world as a set of distinct characteristics clustered under the dominant idea of new labour “flexibility”. This flexibility and indeterminacy can be seen as positive (enabling creativity) as well as negative (constraining creativity). Optimistic to neutral accounts of creative labour in academic research point to the increased possibilities and freedoms that creative labourers gained through the emergence of digital technologies and the globalization of work. Mark Deuze mentions that there are fewer hierarchies in creative work and more collaboration – with colleagues and with the “audience” of creative products and services (2007). Semi-permanent work groups, temporary jobs and freelancing for different employers are now the rule. Creative labourers are moving around in the global creative industries as more or less free agents (Throsby, 2001).

Hartley (2005) also mentions the interactive, hybrid and interdisciplinary – employing many different skills to fulfill many different functions – nature of contemporary creative work often implying higher need for education in various cultural repertoires (2005).

Globalization and digital technologies have not only multiplied the possibilities for creating, producing and distributing cultural goods and services, they have also made life harder for many creative labourers. Increased autonomy and flexibility in the work life of creative labourers come with high costs to income security. Temporary contracts with changing or multiple employers mean that it can become a challenging undertaking to access corporate pension plans and secure old-age provision. Similarly, self-employed creative labourers cannot take maternity leave and usually have to pay the employer contributions to health insurance (Layton, undated). As well, organizing the work force of the cultural sector is extremely difficult in a "network society" where not only bonds between employer and employee are weak but also those among employees – who often do not even know each other because they might be freelancing from home for multiple companies (Rossiter, 2003; Mosco & McKercher, 2007, McRobbie, 2005). In times when all Western industrialized democracies have significantly trimmed the social safety net, the course of work life for creative labourers has become especially unpredictable (Calabrese & Burgelman, 1999). As firms have increasingly faced difficulties in obtaining skilled workers in certain information techonology centres, more analytic attention has turned to the workforce (Scott, 2000; Christopherson, 2004).

Since the creative economy is predominantly seen as a project-based economy characterized by temporary employment relationships, diversity and not speciality is the predominant skill emphasis in what commentators call a "speeded up creative world" (McRobbie, 2005) of invention and innovation. Multiple skills, and multidisciplinarity of practice suggest the traditional sociology of professional organization which underpins collective bargaining is unravelling. It is becoming more challenging in the cultural sector than in other sectors of the economy to have labour organizations representing the work force, engaging in collective bargaining and the improvement of working conditions.

In addition, a new international division of labour does not make these goals any more achievable. Whereas the creation of cultural products still mostly takes place in Western industrialized countries, there is a trend towards locating or re-locating the production of those products in low-wage countries in Asia (Mosco & Stevens, 2007). For example, the ideas for some computer-animated movies are invented in Hollywood but technically converted into movies in Taiwan (Day, 2007). This not only makes unionization of workers who work on the same product close to impossible. It also can mean unemployment for those who produced such movies in Hollywood before the production was outsourced. Neo-liberal policy reform in many countries has often concentrated on shifting labour force policy away from a universal social security model (implicit in the term unemployment insurance, for example) to one of employment and targeted state support. Yet there remain notable variations in the occupational identities and work lives of cultural workers across advanced economies (Christopherson, 2004).

A recent survey of the cultural labour force conducted by the international consulting firm Mercadex for the Canadian Cultural Human Resources Council (CCHRC)[9] in 2002 found that the significant strengths exhibited by the cultural sector are:

- the diversity in people and activities of the sector;
- the passion, motivation, competence and tenacity of workers in the sector;
- the economic impact of the sector (leverage effect for other sectors);
- the sector's close and sustained links with many other industrial sectors;
- the ability of the sector to sustain and increase its activities under adverse conditions.

The significant characteristics of the cultural sector are:

- a significant proportion of independent/self-employed workers;
- a significant proportion of not-for-profit organizations;
- a significant proportion of independent organizations, most of them small by corporate standards;
- a significant proportion of volunteers;
- low remuneration for a highly educated workforce;
- the absence of clearly defined career paths;
- a highly diversified cultural offering (goods and services)

Against this background, the development of policies that speak to the life chances as well as challenges characterizing the current situation of the creative labour force seem all the more necessary. Yet, to our knowledge, there currently exists no comprehensive/ systematic body of policy intelligence about trends in creative labour or policies to ease labour force adjustment. Such a goal is worth pursuing. Just as creativity is becoming the dominant paradigm for the whole world of work (not just for the creative industries), the policies for creative labour today will serve as vanguard for most labour and social policies of the future. The remaining two sections of this paper attempt to map a fairly extensive taxonomy of creative work in Canada based on evidence available.

Searching for the wellsprings of creative innovation

The Creative Europe Report argued for a complete change of paradigm in understanding the nature of creativity governance, which switches focus away from the sole person, creative worker, or creative institution, and onto the collective traits or changing processes of creativity at work. It is an imperative call for academics to which, policy researchers and arts advocates must respond (www.creativeeurope.info).

[9] A not-for-profit agency created in 1995 and reporting to the Minister of Labour.

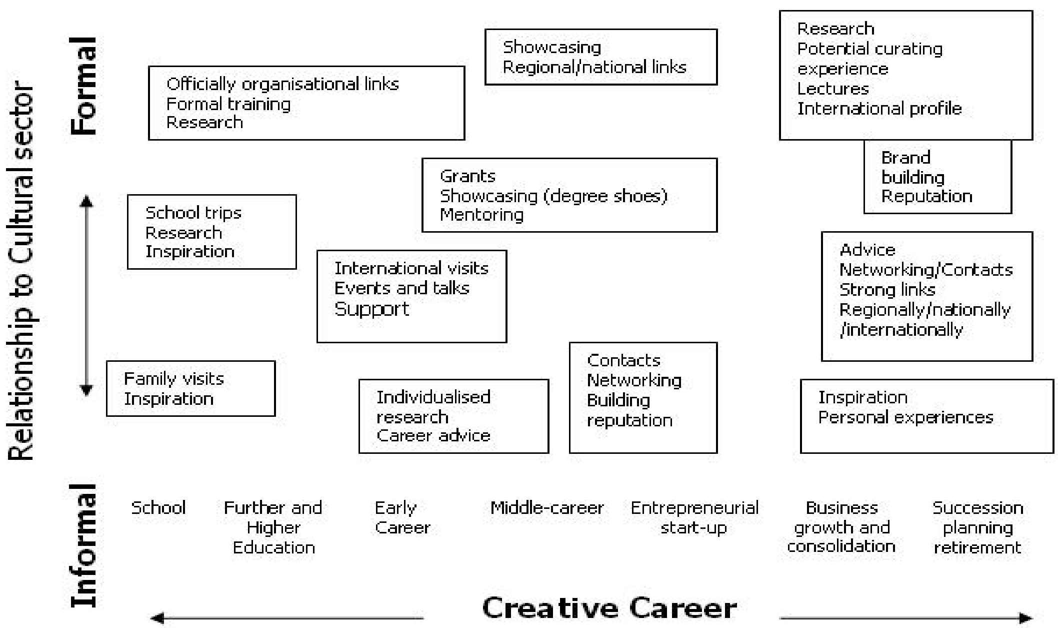
Again, there is a stunning lack of empirical work on the actual nature of creative innovation in the core or ancillary creative sectors in Canada and around the world. However, some early conceptual work (Crossick, 2006) suggests a fundamental difference in how knowledge is constituted. This constructivist view rejects simple models of knowledge or technology transfer, turning instead to the mode of innovation which requires face to face "creative conversations", small scale venues and proximity to a community of practice. Work on Creative Clusters (Panos, in the 2004 Creative London Report) cites the importance of diverse ecologies of small business, individual artists and hobbyists in urban environments, and the importance in cultural planning to maintain affordable live/work space. Rents need to be controlled so that artists are not increasingly forced out of city centres and public, moveable space needs to be protected for rehearsing, and creative hubs for enabling the mix of skills and exchange necessary to refuel the muse. Clearly, attention to the physical conditions of artistic and creative spaces is moving to the top of policy agendas (Federation of Canadian Municipalities has founded a huge cultural infrastructure gap 2008 see www.cultureandcommunties.ca).

Even more contested is the nature of the relationship between cultural practice and intellectual property. If you will remember, a core tenet of the creative economy world view is that it turns on the exploitation of intellectual property (UK, Singapore, Australia). Surprisingly, given the popular dissemination of his views, Richard Florida's definition of the creative class is silent on the role that intellectual property plays in constituting the creative class. In a study of the craft industry in Australia, Ned Rossiter suggests the everyday experience of artists is in fact alienation from the regime of intellectual property: few own title to their own work. Individual workers or workers in small enterprises, which characterize most of the sector, rarely are beneficiaries of intellectual property agreements. Indeed, the skills to negotiate such agreements, or the desire to do so, vary significantly. Many artists oppose the vertical, hierarchical and commercialized regime of intellectual property and do not see it relevant to their small scale production. By contrast, arguments like the International Laboiur Organization's emphasize that the social status of performing artist occupations could be transformed through more systematic use of model contracts and that legal standards concerning intellectual property rights cannot be set aside. Indeed, workers organizations in the performing arts are trying to ensure greater exploitation of ancillary rights for live performers, in video, sound recording and other means (ILO, 2004), after being the major victim in the decline of public arts funding around the world. Greater attention must be given to the role of intellectual property in the workplace and the status it holds as the legal and social architecture governing the conditions of creative production, job satisfaction, employer-employee relations and creative life in general, and for its distributive effects. Arguably, intellectual property claim is less important than entrepreneurial negotiation and execution, as the Canadian tale of the Blackberry with RIIM indicates.

The creator, performer and cultural worker of the new millennium are increasingly in need of multi-disciplinary competencies which are not directly related to the artistic discipline or to the cultural work, but rather those competencies which round out the 'tool box' of skills, among them business skills, possessed by workers in the sector. To succeed and take an active role in the new economy, cultural workers must develop, parallel to their professional skills, general and career management competencies (*Facing the Future,* 2002*)*. These include the ability to understand and negotiate contracts, to actively network, to assess one's progress and review one's goals (Harvey, 2002).

Countries are increasingly addressing the network of education, training and other career supports needed for individual creators. Also important is attention to the capacities of associations and career networks to access the skill development that creative labourers need. Figure 3 demonstrates an interesting way to conceptualize how individual careers move through the cultural infrastructure.

Figure 3: Individual careers and the cultural infrastructure



Source: *Creative Economy Infrastructure Report*, provided by the UK's Creative Economy Programme (found at: www.cep.culture.gov.uk)

The casual labour force

The emergence of networked technologies has led to a new "sociality" in the informal, networked cultures of creative production. "Crowd-sourcing" is increasingly a feature of cultural supply, drawn from Myspace, Youtube, or the hopefuls auditioning in new reality show format TV production. From the early work of economists Baumol and Bowen or cultural theorist Bourdieu, the existence of a large, amateur labour pool which will work for free has worked to keep cultural wages down. The shift to the networked knowledge economy has carried with it fundamental challenges to conventional guild/union/professional organization, according to Manuel Castells:

> ... with the acceleration of the work process [enabled by new ICTs], worker's defense continues to be a fundamental issue: they cannot count on their employers. The problem is that the individualization of management/worker relationships makes the use of traditional forms of defense, in terms of collective bargaining and trade union-led struggles, very difficult

except in the public sector. Unions are realizing this and finding new forms of pressure, sometimes in the form of consumer boycotts to press for social justice and human rights. Also, individual explosions of violence by defenseless workers could be considered forms of resistance. (Castells & Ince, 2003, p.29)

Certainly, unpaid work is characteristic of a range of cultural producers, from the young woman like Feist, the Canadian singer and 2008 Grammy winner who jams as back up for free in local pubs, the local hobbyist who plays for friends to the volunteer accountant who serves on the arts board. Ulrich Beck identifies a nexus between those who work for themselves – a mode of coordination he attributes to "life-aesthetes" in particular – and their desire for "self-development". He goes on to suggest that such dispositions lend themselves to "self-exploitation": "People are prepared to do a great deal for very little money, precisely because economic advantage is individualistically refracted and even assigned an opposite value. If an activity has greater value in terms of identity and self-fulfilment, this makes up for and even exalts a lower level of income" (2000, p. 150). Voluntary and service labour by many artists within the cultural sector would also fit this condition of self-exploitation. Capturing the extent and contribution of this voluntary unpaid labour force is important for its value added to the cultural economy. Stated the CHRDC (2002):

> The extensive use of volunteers in the cultural sector, while indispensable in the context of a resource crunch, acts as a double-edged sword, contributing both to stability and instability within the sector. One of the most serious problems with volunteerism in the sector identified by many respondents is the contention that volunteers are often given jobs that should properly go to paid workers. Not only does this decrease employment opportunities for cultural workers, but it leads to an undervaluing of those jobs and a dilution of the professionalism attached to them.

Both the Canadian and the European cultural statistics do not account for the contributions of non-profit work and volunteer work or charity activities. Thus, the so-called grey or social economy – whose creative input might be considered particularly valuable exactly *because* it is *not* primarily directed towards monetary gain – is currently not included in reflections on policies for the arts and culture sector. Yet there is an emerging awareness internationally that the complexities surrounding culture and creativity cannot be adequately measured by only referring to GDP and employment numbers and improved statistical methods are researched (*The economy of culture in Europe,* 2006 and www.worldvolunteerweb.org). The International Labour Office (ILO) has targeted the development of a system of metrics to measure this hidden sector and its contribution to economic productivity by 2009[10]. The contribution of volunteer work is increasingly recognised by policymakers as essential for the well-being of any society, but up to date there is shortfall in measurable data on its volume, value and characteristics. Currently, only the volunteer work that leads to the production of goods or to the production of services for market enterprises or for non-profit enterprises operating in the market (e.g. some schools and hospitals) are considered. In contrast, a model which emphasizes the social economy can be found in Appendix D.

[10] ILO: leading a manual drive to standardize measurement by Dec 2008-02-12 http://www.worldvolunteerweb.org/browse/volunteering-issues/volunteering-research/doc/ilo-notes-the-importance.html

Conclusion

This paper offered an introduction to the concept of the creative economy. First, we described the „cultural turn“ which is taking place in the economies of industrialized countries and regions around the world. The creative industries sector has a pivotal role by influencing all other sectors in this transition from production-focused economies to economies of meaning oriented towards branding and marketing. We then moved on to current creative economy thinking as it is expressed in a variety of policy papers. The UK and Australia turn out to be among the most pro-active governments in mapping and conceptualizing policies for their creative sectors. These countries mirror the general tendency of policy-makers to take a heavily instrumental approach towards culture and creativity, using it as a means of national branding but mostly as a tool to raise the GDP.

Subsequently, we discussed various definitions and models of the creative economy, favouring David Throsby's model of concentric circles. His model represents core creative arts, cultural, and wider cultural industries and thus is broadly consistent with the cultural value chain. We then broadened the definition of "economy" to include the social economy and we define "creativity" to include the heritage sector but to exclude disciplines that are only remotely related to creative processes such as software applications. In a conceptual move from creative economy to creative ecology, we stressed the importance of the local – and mostly – urban environment in which the creative industries are situated. An "inspiring" urban cultural milieu with affordable housing and visible as well as invisible cultural infrastructure is considered a vital component of a reworked creative economy concept.

Despite different conceptions and measurements, the creative economy is regarded by a growing number of countries – 20 of which are explored in part II and III of this study – as an important emerging policy field. One of the principal shortcomings has been a lack of attention to the changing nature of creative work, and the measures which foster it. The creative labour force is at the heart of the functioning of the creative economy but experiences unusually high degrees of social and income insecurity, expected flexibility and (self)-exploitation – potential inhibitions to the creative process which are not addressed in current policy frameworks for the creative economy.

Part II: Mapping Creative Labour in Canada

Table of contents

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.[11] Despite over 15 years of effort, there is still no standardization in measurement of the Canadian cultural jobs that are non-traditional.[12] 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)[13]. 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[14]). The incidence of the inner core of sound, form, writing and movement disciplines is just under 1% or about 130,000.

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

[12] 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.

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

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

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 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.[15]

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

[15] 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.

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.

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.[16]

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[17];
> – excessively heavy workloads;
> – lack of full-time work;
> – overwork;

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

[17] Documented from qualitative interviews.

- 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;

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).[18] 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"[19]. The Canadian Cultural Human Resources Council has consistently found a shrinking pool of volunteers since 2000 (*Face of the Future,* 2002, Cheney, 2004).[20] As expected, there are sharply

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

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

[20] 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.

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 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[21]

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.[22] There has been

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[21] 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.

[22] 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

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 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*)[23].

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.[24] 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,

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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.

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

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

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 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).[25]

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

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

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 conversion of ideas into tangible, commodifiable assets. The review of Nordic policies[26] 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.

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

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 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.

Appendix A: Official documents mapping or exploring (the impact of) creative industries

United Kingdom:
Department for Culture, Media and Sport:
Creative Industries. Mapping Document 1998 + 2001 + *Creative Britain. New talents for the new economy*, 2008

Denmark:
The Ministry of Trade and Industry and The Ministry of Culture:
Denmark's Creative Potential. Culture and Business Policy Report 2000

Germany - **North Rhine-Westphalia:**
Ministry of Economic Affairs and Energy of the State of North Rhine-Westphalia:
4th Culture Industries Report 2002

Australia:
Australian Government Department of Communications, Information Technology and the Arts and the National Office for the Information Economy:
The Creative Industries Cluster Study 2002-2003

New Zealand
New Zealand Institute of Economic Research:
Creative industries in New Zealand. Economic contribution 2002

Spain/Catalonia:
Catalan Institute of Cultural Industries:
Handbook on the Cultural Industries of Catalonia 2002

Austria:
Mandl, I. *et al.* for Federal Chancellery, Federal Ministry of Economics and Labour of the Republic of Austria, Austrian Federal Economic Chamber:
First Austrian Report on Creative Industries (Erster Österreichischer Kreativwirtschaftsbericht) 2003 + + *Second Austrian Report on Creative Industries (Zweiter Österreichischer Kreativwirtschaftsbericht*) 2006

Austria – City of Vienna:
Ratzenböck, V. *et al*. for City of Vienna (MA 27)/Chamber of Commerce Vienna/Filmfonds Wien:
Untersuchung des ökonomischen Potenzials der Creative Industries in Wien (Survey of the economic potential of Creative Industries in Vienna) 2004

Singapore:
Ministry of Trade & Industry:
Economic contributions of Singapore's Creative Industries 2003

The Netherlands:
Dutch Ministry of Economic Affairs and the Ministry of Education, Culture and Science:
Culture & Economy. Our Creative potential 2005 *Creatieve Industrie in Vlaanderen* 2006

Source: *Quick scan of national policies*, 2007, p.13-14

Appendix B: A Creative Policy Map for the Nordic Region

Research (Data and Intelligence)

Under-developed, under-connected, localised and/or sub-sectoral

<table>
<tr><th>Entrepreneurialism and Creativity</th><th>Growing Creative Businesses</th><th>Building Creative Clusters</th><th>Building Creative Places</th></tr>
<tr>
<td>Local
Multiple policies & initiatives:
• Incubation & knowledge transfer initiatives in universities
• Creativity in education – as a core part of the syllabus
• Targeted business support, such as business advice and inter-firm networks to build confidence and business knowledge
• Connecting creative businesses with other industries
• Seed investment and support for R&D in creative businesses</td>
<td>Local
Multiple policies & initiatives:
• Targeted Creative Industries funds – e.g. Danish Regional Film Funds
• IPR support programmes – underdeveloped
• Market development initiatives, such as place-marketing: e.g. Wonderful Copenhagen's promotion of the city's creative assets</td>
<td>Multiple – most major towns & cities:
• Education at the centre: e.g. Turku Science Park & Roskilde
• Sub-sector-specific – e.g. Aarhus Film City or Oresund Entrepreneurship Academy
• Focusing on convergence – e.g. Lillehammer Kunnskapspark
• Small business –centred – e.g. Naeringshage in Oslo
• Transforming industrial landscapes – e.g. Cable Factory & Arabianranta, Helsinki</td>
<td>Multiple – most major towns and cities and many smaller places. Themes 1-3 are often central. In addition:
Culture and creativity sit at the heart of many strategic plans and are being used as the main driver for talent and inward investment strategies – from Malmo to Kristiansand; Vejle to Tampere. Initiatives range from holistic 'cultural and creativity planning' to strategic approaches to public art, place-marketing, and maximising the increasing diversity of the local population.</td>
</tr>
<tr>
<td>National
Few national initiatives outside education & cultural policy:
• National campaigns & specialist support – e.g. Swedish Design Office, the Finnish Design for All network, Finnish Strategy for Craft Entrepreneurship & Danish Design Centre
• Linking innovation & creativity, e.g. FI in Denmark; Innovation Norway
• Research – e.g. Finnish Strategy for Entrepreneurship in CIs</td>
<td>National
Much on Innovation; less on Creativity:
• Targeted funds – e.g. Icelandic Software Fund and Norwegian software fund
• Business support – e.g. Sile in Finland
• Tax – e.g. VAT exemption for literature in Norway
• Market development: multiple initiatives, e.g. Design for All Network, Finland & the Finnish Programme for Cultural Export Promotion 2007 – 2011; Creative Nation (Denmark)
• Continuous learning: e.g. LearningLab Denmark
• Multiple innovation & technology initiatives – e.g. Innovation Norway</td>
<td colspan="2">Nordic
Low level connectivity and very few pan-Nordic policies and interventions other than pilot or short-term projects: Initiatives include:
- Jenka network – connecting creative businesses, building knowledge and confidence
- VirlncCreate Virtual Incubator Project
- Nordic Innovation Centre (NICe) initiatives – leading the way in establishing pan-Nordic cooperation and partnership.
LOW LEVEL CONNECTIVITY</td>
</tr>
</table>

Source: *A creative economy green paper for the Nordic region*, 2007

Appendix C: Selected policies directed at creative workers and artists (scan of 20 countries)[27]

Education and training

Programmes for younger adults

● Cultural Leadership Programme 2006-2008: multifaceted educational programme directed at emerging artists and creative labourers in the UK to develop entrepreneurial skills: two year programme with a six-strand approach: work placements, creative knowledge lab online, leadership development, black and ethnic minority development, governance development, developing entrepreneurs as leaders (source: www.culturalleadership.org.uk, jointly led by the Arts Council England, Creative & Cultural Skills and the Museums and Libraries and Archives Council)
● Denmark's Roskilde University offers a new 2-year Master of Experience Management and Performance Design (emphasis on managerial skills + own practice) (source: www.ruk.dk)
● The Copenhagen Business School (Denmark) offers a Master programme in Management of Creative Business Processes (source: www.cbs.dk/imagine)
● Creation of the Innovation University in Finland (a merger of the Helsinki University of Technology, Helsinki School of Economics, and the University of Arts & Design, Helsikini) (source: www.innovaatioyliopisto.info)
● Helsinki School of Creative Entrepreneurship: students can take courses in entrepreneurship that are credited at their home university, entrepreneurs can take courses to develop creative thinking as a tool to solve business solutions (www.hsce.fl)
● Manchester Metropolitan University first in UK to teach arts students how to draft business plans and assess the market (source: *The economy of culture in Europe*, 2006, p.31)
● Popakademie in Germany: First academic institution in Germany teaching pop music and music business combined (lecturers from industry: Sony, MTV, AOL) (source: Quick scan, p.31, and www.popakademie.de, 2008)
● Flanders District of Creativity programme offers scholarships for creative workers for attending a Management School Master class in innovation & entrepreneurship (source: *The economy of culture in Europe*, 2006, p.34)
● Initiative of the Danish government to include business orientation in arts studies to help candidates adjust to the reality of the labour market and a life as freelancer or self-employed worker (source: *The economy of culture in Europe,* 2006, p.34)

Workshops

● Workshops on script-writing and funding for half-hour documentaries for film makers aged 35 and under to be then shown on ABC (source: Australian Film Commission Annual Report 2005-2006, can be found at www.afc.gov.au)
● iP ImpulsProgramm of the creative wirtschaft Austria (www.impulsprogramm.at, an initiative of the chamber of commerce of Austria; offers workshops on raising management skills of creative entrepreneurs)
● Programme "Insight out" by UK National Endowment for Science, Technology and the Arts, offered in every region in the UK, it is "specifically designed for creative individuals who want to set up a business within the creative industries"
(source: http://www.nesta.org.uk/programmes/insight_out/insight_out_learning.aspx)

[27] *Examples from the UK, Canada, Germany, Singapore, Sweden, Denmark, New Zealand, Australia, Austria, Norway, Korea, Finland, Turkey, Belgium, Spain, France, Switzerland, Ireland, the Netherlands, Estonia*

Arts education for children (fosters creativity in the young *and* provides income for creative workers)
● Integration of creativity in schools: UK links designers with schools (source: *The economy of culture in Europe, 2006*)
● Turkey introduced a three-year "Technology and design" component in the public education curriculum (source: *Quick scan of national policies, 2007*)
● The governmental agency KulturKontakt in Austria provides advice on how to conduct arts and culture projects in Austrian schools (source: www.kulturkontakt.or.at)
● Singapore's Ministry of the Arts has an initiative within it's the Creative Industries Development strategy 2003 that aims at building "creative capabilities through embedding arts, design and media within all levels of education
● "Five hours of quality arts and culture for every child every week – in and out of school", new initiative by UK government, Feburary 2008, funding secured, in the process of finding partners to develop and implement (www.creative-partnerships.com/offer)

Online course finders
● Online training course finder of the Australian government for the cultural sector (source: www.cultureandrecreation.gov.au) with over 1000 different workshops and degree programmes
● Creative & cultural skills for professionals in the creative industries, containing course database and Learn Direct Advisor via phone (initiative of the UK Department of source: http://www.ccskills.org.uk/)

Awards/grants/contests/artists in residence

Promoting business capabilities:
● Grants for consultancy on entrepreneurship directed at Museums (Australia, New SW)
● Awards for improving company performance and stability (film and tv sector, Western Australia,
(source: http://www.dca.wa.gov.au/about/organisation/portfolio_organisations/screenwest)

Promoting creative capabilities :
● Visual art support/new technology support: Arts Council Norway
● Cultural medallion grant/national artist award/ emerging artist Fund National Arts Council of Singapore
● Swedish Design Award
● "Games of the month" and "Korea game grand awards": game content creation contests held by the government-founded Korea Game Industry Agency (source: www.kogia.or.kr, since 1999)
● National Scriptwriting Competition (for film, by Media Development Authority, Singapore)
● Mobility and Residential Programme for artists and cultural players offered by the Nordic culture point, a governmental cooperation among the Nordic countries, to promote professional networking (source: www.kulturkontaktnord.org)
● Online grants and services search databases (self-updating, provided by the Australian government (source: www.cultureandrecreation.gov.au/grantsandservices/)

Business support and entrepreneurial development (for SMEs and self-employed individuals)

Business advice/consulting:

● Go! Programme supplies advice on business start-ups (business plan, registration, permits, marketing strategies, etc.), special category for creative businesses within this programme, special *cultural* start-up centers throughout province provide advice (founded by the Province of North Rhine Westphalia in Germany, source: www.go.nrw.de)

● Kulturkontakt: Consultancy services for artists and the business community, goal: bringing the two parties together (Austria, Ministry of Culture, since 1989, source: www.kulturkontakt.or.at)

● consulting services offered (Centre of Audiovisual Development, Catalonia, source: The economy of culture, p.33) or funding for accessing such services partly provided (Departure Experts Programme Vienna, source: www.departure.at)

● Intellectual property website for creative individuals and businesses where they can find the latest information on copyright, trademarks, etc. (source: UK Department for Culture, Sport and Media, www.culture.gov.uk)

Funding programmes for creative industries:

● Funding programme for creative SME's with a commercial orientation, annual call for submission of business plans, if accepted up 70% of project costs can come from subsidies: iP ImpulsProgramm of the creativ wirtschaft Austria (www.afc.gov.au):

● Advantage creative fund: venture capital fund for creative SMEs who have problems attracting funding from banks, does not offer grants and loans, invests on strictly commercial terms (www.advantagecreativefund.co.uk, an initiative within the frame of the UK creative economy programme)

● Venture capital and project funding designated for creative businesses has been made available by the following governments (combining public + private money) have founded specific agencies to administer the capital and re-invest the profits made into less profitable cultural projects (Cultural Exportation Project 2005-2010 by Finland, source: www.minedu.fi, Cultuur Invest in Belgium, source: www.cultuurinvest.be, Repayable Contributions Programme by the Catalan Institute of Cultural industries (source: The economy of culture in Europe, 2006)

● These same programmes also offer management support and coaching for creative entrepreneurs in Catalonia, Finland, Belgium

Online funding information databases:

● "Money map – Advice on access to finance", regularly updated file (source: Department of Culture, Media and Sport, source: www.culture.gov.uk) for businesses in the music industry

● Funding Information Service for creative businesses (online search engine, offered by Creative New Zealand and the Ministry for Culture and Heritage since 2007, source: www.NZLive.com)

Tax policies and social security policies

Tax policies

● *VAT reductions on the Earnings of Self-Employed Authors and Visual Artists*:
Artists play less than half of the standard VAT in many countries, for example in Austria, France, Germany or Belgium. They are largely excluded from any VAT at all in, for instance, Switzerland, Spain and Denmark. In Canada and the UK, artists pay the standard VAT rate. (source www.culturalpolicies.net/, 2007)

● *Special Income Tax Measures for FreelanceArtists* (referring here to independent creators and performing artists): income averageing in place in the following countries: UK (over 2 years), Denmark (up to 10), Austria, Netherlands, France (3), Germany, Finland (several years), no income averaging in Canada, Belgium, Italy (source www.culturalpolicies.net/, 2007)
2. Special allowances: no significant deductions or exemptions in place in Canada, the UK, the Netherlands and Belgium, 50% income tax deduction, 30% in Germany, total tax exemption in Ireland, 25% in Italy, 5-7% in Austria

● Tax credit for creation of games by French government (source: www.legifrance.gouv.fr .)

● Tax credit for interactive digital media and for computer animation and special effects (Canada, Ontario, source: www.omdc.on.ca)

● Tax deductions: cost for owning and maintaining a musical, instruments and annual employment expenses up to $1.000 can be deducted, artistic work can be donated for a tax credit of its market value source: CCA backgrounder – taxation of artists and the arts, 2008)

Creative/Social Security policies

● Social Security Laws and Measures to Support Self-Employed Artists: quantitative overview of 38 Eastern and Western European countries plus Canada and Russia, the majority (22) do not have any law for self-employed artists in place (among them: UK, Italy, Norway, Sweden Portugal). For those countries that have such laws, the extent and nature of measures differ widely from country to country. Examples of countries which have laws for self-employed artists:

- Austria *Law on Social Security for Artists* (2001)
- Estonia: *Act on Creative Artists and Creative Artists' Unions* (2004)
- Finland: *Act on the Pensions of Artists and Some Particular Groups of Short -Time Workers* (1985)
- France *Social Security Scheme for Self-Employed Artists* (1977)

The following are examples of countries which supply:

1. Pension supplements: Canada, Austria, France, Germany (22 out of 38)
2. Unemployment insurance: Estonia, Ireland, Netherlands, Norway, Switzerland (5 out of 38)
3. Both: 4 out of 38 (source www.culturalpolicies.net/, 2007)

● Website for artists where they can calculate the pension they can expect plus UK-wide free seminars on “Pensions for artists” which provide advice **pension planning** (source: www.pensionsforartists.org, 2008)

● Germany: Artists Social Fund (source: www.kuenstlersozialkasse.de), unique in Europe, offers statutory **social insurance for self-employed artists** /creative labourers. The artist only has to pay the employee part (in contrast to other self-employed workers who have to pay both employer *and* employee part) since industry users of the creative products together with the state pay the employer part, founded in 1982, revised in 2007)

● **Status of the Artist legislation** (addresses labour relations for self-employed professional artists, would make collective bargaining possible for self-employed artists, is a UNESCO initiative, adoption at different levels in different countries (example: Canada, source: Canadian Conference of the Arts (source: http://www.ccarts.ca/en/advocacy/bulletins/2007/1707.htm, 2007)

Appendix D: A Social Economy Logic Model

Vision:
An expanded social economy able to make its full contribution to building resilient communities offering a good quality of life to all members.

Societal Objectives

Greater Social Inclusion	Enhanced Self-Sufficiency	Greater Equity of Outcome	Improved Human Health	Wealth Generation through Social Ownership

Inputs

Financial Capital	Knowledge/ Research	Opportunities for Learning	Enabling Policies	Infrastructure and Partnerships

Activities and Structures

Community Organizing and Planning	Development of Community Infrastructure	Human Capital Development	Social Enterprise Development	Organizational and Community Learning

Social Economy Enterprises	CED Organizations	Sector Support Organizations and Networks	Private and Public Sector Partners

Results – Four Levels

1.. Economic and Social Benefits for House-Holds	*Examples*: Employability and employment; earned income; knowledge and skills; enterprise development; affordable housing; child care; participation in civic affairs.
2. Organizational Capacity Building and Enterprise Development	*Examples*: Creation, expansion and modernization of social economy enterprises; revenue generation for reinvestment; management capacity of boards especially for enterprise development; community organizing, planning and learning; recruitment and retention of development organization boards and staff.
3. Community and Systemic Changes	*Examples*: Citizen participation in community building; partnerships and networks; community visions and strategic plans; integration of programs/ services; new structures and institutional capacities; community resilience.
4. Measures for Building the Social Economy Sector	*Examples*: Enhanced capacity for communication and organizing within the sector; identification of priority issues for sector development; opportunities for peer learning and scaling up of effective practices; communication and collaboration with government; formulation of supportive policies and reduction of policy barriers.

→ **Feedback loop for continuous learning and change**: Check if "2. Organizational Capacity Building and Enterprise Development" and "3. Community and Systemic Changes" are contributing to fulfilling the outlined "Vision".

Source: Caledonian Institute of Social Policy: http://www.caledoninst.org/Publications/PDF/566ENG%2Epdf

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Selected online resources related to the creative economy

Canadian Cultural Observatory :
www.culturescope.ca

The Conference Board of Canada:
www.conferenceboard.ca

International Federation of Arts Councils and Culture Agencies:
www.ificca.org

Creative Infrastructure report related to the UK's Creative Economy Programme:
http://www.cep.culture.gov.uk/index.cfm?fuseaction=main.viewBlogEntry&intMTEntryID=2989

United Nations Volunteer Programme:
http://www.worldvolunteerweb.org/browse/volunteering-issues/

Canadian Culture Statistics:
http://www.statcan.ca/english/freepub/87-008-GIE/about.htm
http://www.statcan.ca/english/research/89-613-MIE/2004004/summary.htm
http://www.statcan.ca/Daily/English/060612/d060612c.htm

Cultural human resources in Canada:
http://www.culturalhrc.ca/research/default-e.asp

Information on the social economy:
http://www.socialeconomyhub.ca/hub/index.php?page_id=9

Canadian Conference of the Arts

Canadian non-profit sector: http://www.gdsourcing.ca/CIP/Websites-NP.htm