Analysis of the EU Audiovisual Sector Labour Market and of changing forms of employment & work arrangements

Preliminary findings

Prepared for:
Sectoral Social Dialogue Committee "Audiovisual"

Plenary meeting

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Content of this presentation

EU co-funded project “Analysis of the EU Audiovisual Sector Labour Market and of changing forms of employment & work arrangements” (VS 2015 0046)

Steering Committee: EURO-MEI/UNI Europa, FIA, FIM, EFJ, EBU and CEPI

- Objectives and approach of the study
- Current state of play
- Preliminary findings at the national level (DE, ES, FR, IT, UK)
- Next steps
ANALYSIS OF THE EU AUDIOVISUAL SECTOR LABOUR MARKET: EMPLOYMENT & WORK ARRANGEMENTS

Purpose of the study and approach

- **Main objectives**
  - Mapping and understanding **drivers of changes** for the audiovisual sector contributing to shape employment trends;
  - **Labour markets trends** since 2008: evidence on forms of employment and work arrangements and terms and conditions;
  - How employment and work arrangements enable or limit access to professional training and life-long learning schemes; and
  - Role played by social partners in defining terms and conditions of different employment and work arrangements, and impact of changes on collective bargaining coverage and density of employer and trade union organisations.

- **Analysis of data and literature at the EU level**

- **Field work in 10 Member States: Czech Republic, Denmark, France, Germany, Italy, Netherlands, Poland, Romania, Spain, the United Kingdom (pilot countries: Italy, Spain, France)**
  - Desk research
  - Semi-structured interviews with member organisations of EURO-MEI/UNI Europa, FIA, FIM, EFJ, EBU and CEPI at the national level (mostly face-to-face interviews)
  - Interviews with relevant stakeholders
Current state of play

- Study kicked-off in April 2015

- Analysis of Eurostat data (tailor-made requests) - mostly Labour Force Survey (EU-LFS), two-digit level, NACE Rev.2:
  - Period considered: 2008-2013

- National level research
  - Main phase of field work completed in all ten Member States
  - 5 reports already submitted to the Steering Committee: France, Italy, Spain as well as Germany and the UK
  - Finalisation of field work by mid-December
Key sectoral trends (Eurostat, LFS)

- Approximately **810,000 workers across the EU (2013)** across J59&J60 in 2013
  - J59: Motion picture, video and television programmes, sound recording and music publishing activities: 460,000 workers
  - J60: TV and radio broadcasting: 350,000 workers
  - A total gain of 72,000 workers between 2008 and 2013 in both sectors

- 10 countries covered by the study (UK, DE, FR, IT, PL, CZ, RO, DK): 80% of employment in the sector in the EU-28
Characteristics of businesses and the workforce in the AV sector

- Average number of employees per enterprise: 3.8 in production, 10.4 in radio broadcasting and 36.1 in TV broadcasting

- A male-dominated sector: 38% of women

- A younger workforce compared to the overall economy
  - Higher representation of the younger segments in motion picture, video and television programmes, sound recording and music publishing activities

- A highly educated workforce:
  - 57% of the AV workforce is highly educated (60% in broadcasting, 54% in production) against 32% for the entire economy
Employment and work arrangements in the AV sector

- **J59 - ‘Motion picture, video and television programmes, sound recording and music publishing activities’ characterised by atypical work arrangements compared to the entire economy**
  - Higher occurrence of self-employment (31% of all workers), temporary employment (26%) and part-time employment (25%)

- **J60 - TV and radio broadcasting sector dominated by ‘standard employment contracts’**
  - Share of temporary employment close to the average across all sectors (14%) ; lower occurrence of self-employment (10%) and part-time employment (13%)

- **Evolution since 2008:**
  - Overall increase in number of self-employed and part-time workers (for both sub-sectors)
  - Stable number of temporary workers overall - increase in production and decrease in broadcasting
Trends in the audiovisual sector at the national level

- Different definitions of the sector apply; ‘creative industries’

- A sector dominated by SMEs (highly concentrated in some regions), largest employers are TV broadcasters especially public-funded broadcasters

- Main drivers of change:
  - Technological change – switch to digital production methods
  - Growing internationalisation of the sector
  - Changes in the market and demand from users (on-demand and online TV services, emergence of new providers such as Netflix and Amazon Prime, etc.)
  - Infringements in copyright
  - Decline in advertising revenue for broadcasters
  - Changes linked to TV licenses fee settlement
  - Cuts in public budgets and subsidies
  - Impact of labour market reforms (DE, ES)
  - Impact of the recession in Spain with significant restructuring (lay-offs and closures)
National data on employment and work arrangements

Limited availability of data overall or partial coverage

- IT: Key gaps due to the complexity of the sector and forms of work, lack of national comprehensive data or research

- FR: Administrative data from Audiens: by industry (production of TV programmes/motion pictures/animated films, technical industries, radio broadcasting and TV broadcasting); data on take-up of continuous training (AFDAS)

- UK: Sector-specific survey (2012 Creative Skillset Employment Census of the creative media) distinguishing between freelance and permanent employment, but partial coverage (not including freelance in film production, performers)

- DE: Household survey (national statistical institute), coverage: J59&J60

- ES: national household survey (INE) and National Central Business Register, at three digit level – distinction between permanent and fixed-term contracts, no data on self-employment
## Work arrangements at national level: an overview

<table>
<thead>
<tr>
<th></th>
<th>Spain</th>
<th>France</th>
<th>Italy</th>
<th>Germany</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Standard employment contracts</strong></td>
<td>Dominant in large enterprises <strong>Down</strong></td>
<td>Depends on the size of company and sector Mostly for support functions and/or in broadcasting</td>
<td>Dominant in RAI <strong>Down</strong> (interviewee assessment)</td>
<td>Dominant (men) <strong>Down</strong></td>
<td>Relatively widespread (broadcasters)</td>
</tr>
<tr>
<td><strong>Fixed-term contracts</strong></td>
<td>Widespread <strong>Up</strong></td>
<td>Widespread with variations by industry, company size, occupational groups (all actors)</td>
<td>No information available</td>
<td>Widespread <strong>Up</strong></td>
<td>Dominant form for performers, creative workers, musicians, etc. <strong>Up</strong></td>
</tr>
<tr>
<td><strong>Part-time employment</strong></td>
<td>No data available</td>
<td>Uncommon</td>
<td>No information available</td>
<td>Relatively widespread (women) <strong>Stable</strong></td>
<td>Uncommon (Common at the BBC)</td>
</tr>
<tr>
<td><strong>Traineeships/internships and apprenticeships</strong></td>
<td>Uncommon Depending on subsector <strong>Slightly up</strong> (journalists)</td>
<td>Uncommon</td>
<td>Almost inexistent</td>
<td>Uncommon (young people)</td>
<td>Relatively widespread (no data available)</td>
</tr>
<tr>
<td><strong>Self-employment and freelance work</strong></td>
<td>Relatively widespread <strong>Up</strong></td>
<td>Uncommon <strong>Slightly up</strong></td>
<td>No information available <strong>Up</strong> ((interviewee assessment)</td>
<td>Relatively widespread <strong>Up</strong></td>
<td>Dominant form for performers, creative workers, musicians, etc. <strong>Up</strong></td>
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</tbody>
</table>
What is ‘atypical’ for the rest of the economy is the norm in the audiovisual sector, due to organization on a project basis

- Italy: No statistics or studies available, but likely increase in self-employment
- Spain: Strong impact of the crisis on the volume and structure of employment in the sector; outsourcing as a way to reduce costs and development of the ‘economically-dependent self-employed’ status
- Germany: contraction of permanent jobs in the TV sector; impact on labour market reforms: DE (Hartz IV reform), and sub-contracting work to self-employed professionals and using short-term contracts
- UK: Prevalence of freelance employment - not defined in UK law! Most employment contracts are fixed-term as they are project or production-based
- France: *Intermittence* for artists and technicians, based on fixed-term contract (CDDU) and linked to specific provisions; self-employment very limited due to historical and institutional factors
Issues stressed by interviewees concerning working conditions

- Heterogeneous levels of earnings among self-employed/freelancers or *intermittents* in France (hierarchy in terms of pay and advantages based on experience, role)

- Work intensification - expectation to create the same output in shorter periods of time.

- Changing work profiles, multiskilling: employees are now expected to cover multiple tasks, boundaries between professional categories are becoming obsolete

- Atypical working hours; working hours are becoming less and less defined, linked to teleworking and new technologies
Access to continuous training

- Across the EU, 17% of workers in the AV sector received some education and training in the previous four weeks (15% in 2008) – EU-LFS

- FR: Recognised right to continuous training for all employees in the AV sector regardless of the type of contract (open-ended, standard fixed-term contract or intermittent)

- Issues for the self-employed and temporary workers to access training (not covered): DE, IT

- UK: Creative Skillset is the main provider of training for freelancers but large employers cut their contribution to Creative Skillset

- ES: Current system managed by the Tripartite foundation under heavy reform
Coverage of atypical workers and impact on trade union density

- **IT**: Trade unions typically represent permanent staff (RAI, Mediaset, Sky)
- **UK**: Trade unions also cover freelancers - increasing density of membership among freelancers, particularly in film and TV (e.g. half of BECTU members are freelancers)
- **DE**: Increase in atypical work contracts and self-employment result in a decrease of trade union membership (ver.di)
- **ES**: Development of self-employment affecting the density of trade unions
- **FR**: Self-employed cannot be represented by a trade union
Next steps

- Presentation of initial findings to 3rd Steering Committee (20th October 2015)
- Feedback on national reports submitted
  Completion of national research
  Comparative analysis (October-December 2015)
- Submission of Draft final report (comparative analysis) (January 2015)
- Round of revisions of the report (January-March 2016)
- Presentation of findings at a project seminar in Brussels (April 2016)
- Final report and end of the project (May 2016)
Thank you for your attention!

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