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REPORT 1B

IDENTIFICATION OF SKILLS GAPS IN CROSS-MEDIA DESIGN AND PRODUCTION IN THE CREATIVE INDUSTRIES AT THE NATIONAL LEVEL

Luk Bouters, Gillian Mothersill, Tommie Nyström, Robert Sutter, Jörg Westbomke

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Table of Contents

1	Introduction	3
2	Country Strategies	3
2.1	Belgium	3
2.1.1	Background information	3
2.1.2	Main findings of the study	4
2.2	Germany.....	5
2.2.1	Background information	5
2.2.2	Main findings of the study	6
2.2.3	Assessment of and participation in (a) European Sector Skills Council(s)	6
2.3	Scotland/United Kingdom.....	6
2.3.1	Background information	6
2.3.2	Sector Skills Councils	7
2.3.3	Characteristics of the CCI in Scotland.....	8
2.3.4	Main findings of the study	8
2.4	Sweden.....	9
2.4.1	Background information	9
2.4.2	The Agency for Higher Vocational Education.....	9
2.4.3	The Public Employment Service	9
2.4.4	Sector and Transversal Councils	9
2.4.5	Forecasting of jobs and skills needs	10
2.4.6	Assessment of and participation in (a) European Sector Skills Council(s)	11
2.5	Canada	11
2.5.1	Background information	11
2.5.2	Assessment of and participation in (a) Canadian Sector Skills Council(s)	13
3	Conclusions	16

1 Introduction

This second of two initial reports into the developing requirements of the Creative Industries Cross Media Design and Production sector will focus on national strategies of the four CIGN participating nations (Belgium, Germany, UK/Scotland and Sweden) and observations from the silent partner, Ryerson University in Toronto, Canada.

These approaches vary. Not all of the partner's home countries have a cohesive national strategy for gathering data on the emerging Creative Industries sector in Europe and beyond. Geographically, the home countries and communities differ greatly in the scale and composition of regional and national governance. In some cases they adopt a *National Sector Skills Council* approach to gather data on emerging Cross Media Design and Production areas. Others rely on a close relationship with key industrial partners as a way of communicating, sharing best practices and identifying future labour and market trends and requirements.

It is the intention of this report to identify these varying national strategies, investigate the main findings from each partner's research and identify key areas for future curricular development within a shared pan-European, and future global networks.

2 Country Strategies

A questionnaire, based on findings from the initial research was distributed to key national agencies/strategic partners, and once collated, form the basis of curricular development in the emerging area of Cross Media Design and Production

2.1 Belgium

2.1.1 Background information

In Belgium, many initiatives are carried out for matching skills demand and supply. Many of these initiatives are undertaken at regional levels, as this task is the responsibility of the regions and not of the Federal Government. Education is the responsibility of the linguistic communities of Belgium (Dutch-speaking, French-speaking and German-speaking) and continuing vocational training is the responsibility of the Regions (Flanders, Wallonia and the bilingual Brussels-Capital). Sectorial bi-partite agreements (*commissions paritaires*), which set the employment and continuous training frameworks, are signed at the national level but are generally executed at regional/community levels. As the University College Artevelde resides in the Flemish region, this document will limit its research scope to this region.¹

¹ This country report refers to data presented in the report: Sector Councils on Employment and Skills at EU level [1]

2.1.2 Main findings of the study

In Flanders, there are sector commissions in the following sectors: goods transport, metal and technological industry, textile and confection, welfare and health care, timber and construction, and tourism. These commissions formulate policy proposals regarding socio-economical issues in specific sectors for the Flemish Government. Their composition and competence are similar to the Social and Economic Council, but limited to a specific sector. The sector Commissions are made up of employer and employee representatives.

In 2004 the Flemish Government established the Flanders District of Creativity. The main aim of this organization is to stimulate creativity in industries in order to create new jobs and to maintain a healthy economic environment. Within this framework a position paper [2] was published in 2011 by the 26 Flemish Creative organisations united in the Flanders Creative Industries Platform. In this paper they formulated six policy priorities for further follow-up by the Flemish government. One specific policy recommendation urges the Flemish government to further the integration of business and entrepreneurship skills training among higher arts education and other education courses that prepare students for a career in the Creative Industries.

There is no single body responsible for skills identification for the Creative Industries in Flanders. However, there are a number of sectoral training funds (STFs) monitoring skills identification for various segments of the creative industries, but not for the creative industry as a whole. In particular, GRAFOC² and CEVORA³ are of interest for the identification and training of new competences for professional profiles in media design and production. Additionally, there is mediarte.be. This sector training fund deals with the audio-visual sector. The board is composed of employers' and employees' representatives. Thus, education or training bodies are not represented on those boards.

All the STFs are run by bipartite and joint boards, which have equal representation from employees and employers. In general, both private and public training centres and consultants provide training and other supported activities to the STFs. Both promote training programmes and employment opportunities. For the implementation of training programmes, they cooperate with a network of specialized partners for which they can contract educational institutions and professional trainers. In addition to the two organizations mentioned above, there is also the SERV⁴. The Competency Team of SERV is working on development and implementation of the occupational profile database, *Competent* in close co-operation with the VDAB (Flemish Employment and Training Service). The team is working with Flemish employer and employee organisations and the various sectors. *Competent* is an occupational profile database. It contains profiles with the details of occupations, the activities employees are expected to perform, required competencies and expertise, and how the work is organised. The profiles cover the entire labour market. They are classified into domains and clusters, which makes the information easy to search. SERV ensures that the profiles remain up-to-date and that they are approved by the social partners. In the area of education and training, the content of *Competent* serves as the prime source for the Flemish Qualification Framework. Over time, in Flanders we will also be working in this policy domain with a 'common' competence

² GRAFOC is the sectoral training fund for labourers (blue collar workers) in the print media industry.
<http://www.grafoc.be/>

³ CEVORA is a transversal training fund for employees (white collar workers) in a range of sectors.
<http://www.cevora.be/generic/wiezijnwij>

⁴ SERV: In the Flanders Social and Economic Council (SERV), Flemish employers and employees discuss and consult about issues falling within the scope of Flemish authority.

language. *Competent* is able to support sectors, companies and organisations with their HR policy, job classifications, etc. Based on the data in *Competent*, they can develop instruments linked to those used by providers of labour market services and training.

All three organizations mentioned run their study centre that monitors employment development in the sectors and undertakes studies on several issues such as hard-to-fill occupations, professional and qualification profiles, and training needs. Studies are undertaken in cooperation with other research centres, federations, social secretariats, and outsourcing agencies. Extensive contacts are maintained with companies for identifying and monitoring training needs. As CEVORA covers a number of sectors as opposed to GRAFOC it is the larger of the two and it employs a greater number of professional staff.

Besides the activities of the above-mentioned organizations, many activities are undertaken in Flanders and Belgium to identify skills demand and supply and to enhance skills. An example is a joint project of the Flemish Government and social partners known as Competence Agenda 2010 [3]. The project has a budget of 38 million Euros, which is being used for competence development in the period 2007 to 2009⁵. To form the agenda, an external research company was commissioned to undertake research on future skills, amongst others. The project develops the talents and capacities of students, teachers, jobseekers and employees so that more people are employed⁶.

Since there is not an active sector council for the creative industries, the Belgian partner of the CIGN-project took the initiative to contact potential and possible partners of such a creative skills council and to propose a meeting. At this meeting the questionnaire regarding future skills for the creative industries will be discussed. The following organizations are contacted: CEVORA, Mediarte.be, GRAFOC, Flanders DC and SERV.

2.2 Germany

2.2.1 Background information

In Germany education, professional training, culture and media are not competences of the Federal Government but of the *federal states*. The *Ständige Konferenz der Kulturminister der Länder* is the coordination body of cultural and education ministers of the federal states. It has different committees and subcommittees including committees on higher education, professional training, and culture. The main national organisation concerned with vocational education is the *Federal Institute for Vocational Training* (BIBB). Social partners sit in its governing body and are directly involved in the development of the curricula of *regulated professions* taught in the dual system (a combination of theoretical and on-the-job learning). In addition to the dual system (mostly for technical occupations), professionals active in audio-visual sectors graduate from arts and research universities (performers and other artistic occupations, journalists, etc.), universities of applied sciences (sound engineers, senior technicians, producers, etc.), and in private education and training bodies.

⁵ http://www.esfagentschap.be/uploadedFiles/Voor_ESF_promotoren/Nieuwe_oproepen/Fiche%20oproep%20Lerende%20Netwerken%20Competentiemanagement

⁶ <http://www.acw.be/content/view/905/400/>

Continuous training is less developed but ad-hoc schemes are managed by educational institutions, employers' dedicated institutes (e.g. *ARD.ZDF Medienakademie* or *RTL School of Journalism*) and professional organisations (*Deutscher Bühnenverein, German Association of Orchestra, German Theatre Technical Society*, etc.).

2.2.2 Main findings of the study

There is no equivalent to National Sector Skills Councils in Germany. Dialogue and co-operation between the world of education and training and the labour market are decentralised, except for *regulated professions (dual system, negotiations under the umbrella of the Federal Institute for Vocational Training)*. Many participants, (public institutions, employers, trade unions, professional associations, networks of schools and universities, etc.) are active in the education and training fields, and produce occupational standards, education and employment data, etc. Information is not centralised however at the sector level in the perspective of monitoring trends in employment and skills needs. Education and training bodies (especially universities) have developed specific projects (i.e. *the Nexus project* or dedicated Career centres) to support students' insertion in the labour market.

2.2.3 Assessment of and participation in (a) European Sector Skills Council(s)

Interests from German stakeholders in seeing the set up of (a) European Sector Skills Council(s) in the audio-visual field are mixed for reasons of opportunity (solid German vocational and educational landscape), representation (no equivalent bodies to Sector Skills Councils, decentralized decision making processes at federal state level), and perspective (resistance to a potential harmonization of educational and training systems). Interest in an enhanced exchange of information and best practices at European level between education and training providers and labour market stakeholders has been expressed but only if implemented in a light and flexible way.

The specific objectives of a European body, and the representation of German stakeholders in such a structure will need to be further discussed with German social partner and education representatives.

2.3 Scotland/United Kingdom

2.3.1 Background information

In the UK, the generally accepted definition of the creative industries is: *'Those industries which have their origin in individual creativity, skill and talent which have a potential for wealth and job creation through the generation and exploitation of intellectual property'*. (UK Department of Culture, Media and Sport⁷)

The Scottish Government describes the Creative Industries as: *'those which have their origin in individual creativity, skill and talent. They include industries that have the potential to create wealth and jobs through the development, production or exploitation of intellectual property'*

⁷ <https://www.gov.uk/government/policies/media-and-creative-industries>

The creative industries in Scotland generate more than £5 billion of turn-over in the Scottish economy and in March 2011, the Scottish Government made a commitment to build on this potential – The creative industries sector in Scotland experienced significant growth over the last decade. In 2008, turnover in the creative industries stood at £5.7 billion.

Scotland's cultural development body, Creative Scotland⁸ was formally established on July 1, 2010 as a single, national body for arts, culture and creative industries. Its aim is to modernise the network of investment, build new relationships and support Scottish talent and creative enterprises to empower them to succeed at home and internationally and help realise the potential contribution of creativity in every part of society and the economy.

2.3.2 Sector Skills Councils

The UK has a very well developed model of Sector Skills Councils. Two national Sector Skills Councils deal with, among other subsectors, the areas covered by the CIGN project.

Sector Skills Councils in the UK are independent, employer led UK wide organisations that aim to develop skills standards with employers to support productivity and profitability growth and enhance competitiveness in UK and overseas markets. There are 18 sector skills councils and 5 sector skills bodies in the UK who work with over 550,000 employers to define skills needs and standards in their industry.

There are 2 main Sector Skills Councils in the UK pertaining to the Creative and Cultural Industries (herein CCIs): *Creative Skillset*⁹ (TV, Film, Radio, Interactive Media, Animation, Computer Games, Facilities, Photo Imaging, Publishing, Advertising and Fashion and Textiles) and *Creative and Cultural Skills*¹⁰ (Craft, Cultural Heritage, Design, Literature, Music, Performing, and Visual Arts), both of which have Scottish departments as an integral part of their structure.

Creative & Cultural Skills, primarily focus on the areas of music, theatre, design and cultural heritage and also provide opportunities for employment, training and apprenticeships in each of these convergent sectorial areas.

Creative Skillset focus on the areas of Advertising and Marketing Communications, Animation, Fashion and Textiles, Film, Games, Photo-Imaging, Publishing, Radio, Television and VXF and are therefore very well served to assist the CIGN project in the area of Cross Media Design and Production. CSS cover the four countries that make up the United Kingdom, (England, Northern Ireland, Scotland and Wales). Regional centres are located in each country and address specific local as well as national requirements.

Both organisations have dedicated full time staff and run large-scale research projects in the fields of labour market intelligence and apprenticeships, among other initiatives:

The CCIs in the UK can also be influenced by other Sector Skills Councils, in particular e-Skills UK¹¹ (Software, Internet and Web, IT Services, Telecommunications and Business Change). It is important to note the increasing blurring of boundaries and interdisciplinary fusion between the various elements and platforms that make up the creative industries in the UK.

⁸ www.creativescotland.com

⁹ www.creativeskillset.org

¹⁰ www.ccskills.org.uk

In 2010 a Council for Industry and Higher Education, (CIHE) report stated senior BBC technical staff, producers, engineers and technologists will increasingly converge into teams working together to deliver interface, service and content – as one product – rather than different teams working in isolation and then hoping to tie the solution together. This led to e-Skills, Skillset and Creative & Cultural Skills consistently identifying development of hybrid skills – *‘technical, business, creative, and interpersonal – as the vital pre-requisite of monetising content and services’* [11].

2.3.3 Characteristics of the CCIs in Scotland

CCIs in Scotland are characterised as supporting:

- Small businesses: A high proportion of work is self-employment/freelance work. The Labour Force Survey 2010 showed around 20-25% of the creative industries workforce is self-employed – more than double the average for all industries across Scotland. Overall, 25% of those working or available for work in the Creative Media Industries are *‘freelance’* and the remaining operate on an *‘employee’* basis. For the Creative and Cultural Skills footprint 44% describe themselves as *‘self-employed’*. Excluding self-employment, there has been a steady increase in employment e.g. from 38,500 people in 1998 to over 63,000 in 2012. In 2008 there were 8,485 registered enterprises operating in the CI sector in Scotland (5% of all registered business in Scotland); 97% of the enterprises are small, Scottish owned and account of 69% of employment, 60% of which have 0 employees). The Employer Survey report indicates that 75% of employers recruit through personal contacts. This is manifested through various working methods which include:
 - Project/ad-hoc work
 - Informal hiring/work experience
 - Portfolio career.
 - Use of Creative networks.¹²

2.3.4 Main findings of the study

UK sector skills councils are responsible for the live performance, design and cultural heritage; (Creative & Cultural Skills) and audio-visual sectors (Creative Skillset). They have developed strong ties with the industry through their governance structures, their consultations schemes, and other ad hoc co-operations implemented in the context of specific projects.

They are employers’ led bodies but they also involve trade unions and further and higher education sectors in their strategic decisions. Stakeholders confirmed the representative voice of those organisations in skills discussions.

The UK sector skills councils have developed sophisticated models to gather labour market intelligence in the audio-visual and live performance sectors. They also offer online information portals for career development in those sectors. Apprenticeship and the development of quality training schemes have been one of the key focus areas of both organisations in the recent years.

Creative & Cultural Skills and Creative Skillset have already been involved in numerous European and international activities. Transfer of good practices from the UK to other countries has been one of the main focuses of those partnerships.

¹¹ www.e-skills.com

¹² *‘Freelance’* = contract of less than 365 days and *‘employee’*=contract of 365 days or more.

2.4 Sweden

2.4.1 Background information

There are no Sector Skills Councils in Sweden. Training issues are dealt with at the company level in social dialogue frameworks or in the context of sector initiatives. However there are professional advisory bodies, to the Creative and Cultural Industries below.

The Swedish Employment office has a dedicated *culture and media department* offering specific support to unemployed workers in those sectors, including access to training. It produces regular data on unemployment trends in the culture and media field, and convenes several times a year a consultation group made up of professional organisations and education providers. Focusing on an exchange of information, this group is not developing overall strategies on skills anticipation or skills matching.

Several other public institutions (Arts Council, Arts Grant Committee, etc.) address the topics of employment and working conditions in the sector, and produce data and statistics.

2.4.2 The Agency for Higher Vocational Education

The main mission of this agency is to be responsible for matters relating to the Polytechnic in Sweden and to ensure that training meets the needs of working life skills.

They analyse the social needs of education in the Polytechnic, deciding which courses are to be included in the UAS and oversee government grants for the training. They check and also assess the quality of programs and results. In addition to this, they are responsible for matters relating to two forms of education that are outside the Polytechnic - arts and cultural education and interpreter training programs in adult education.

The Authority oversees the training requirements and programs that are within their remit, and manage comments and complaints on education. They are also responsible for coordinating a national structure for validation of training and professional skills, and they are the national focal point for the EQF (European Qualifications Framework).

2.4.3 The Public Employment Service

Labour market related institutions have experienced a long history in Sweden. The Public Employment Service (AF - Arbetsförmedlingen), was founded at the turn of the 19th century. Over time, it evolved from a private organisation into a public one. Sweden also has a long tradition concerning the involvement of the social partners in labour market related councils, although more for continuing than in initial training.

2.4.4 Sector and Transversal Councils

Initial vocational education and training

Up to now, upper-secondary education was divided into 14 vocationally oriented sectors (e.g. health care, technology) and 3 academic national programmes. The main features of this structure were approved by Parliament some 15 years ago. To ensure that the various programmes matched requirements of, on the one hand higher education and on the other, of the labour market, temporary committees were set which prepared curriculum outlines (aims, subjects, exams, etc.).

The tri-partite working groups (representatives from the branches / sectors, the trade unions, and the school system) prepared the programmes in close cooperation with the world of work. The national level Agency of Education is responsible for ensuring that the aims and outlines of the various programmes keep matching the changing requirements of higher education and the labour market. Whenever this is no longer the case, a new temporary working group is formed to revise the curriculum outline.

Currently, a reform of upper-secondary education is being proposed. The new upper secondary structure will have three tracks: the academic and vocational tracks will be modernised and a new apprenticeship system be added. For each of the programmes, an advisory board will be set up to develop the programme outlines. In the law, the tri-partite advisory boards will be given a permanent status. This status creates the conditions for a better contact between the training system and the world of work.

Continuing Vocational Training

The Public Employment Service (AF - *Arbetsförmedlingen*) is divided in 68 labour market regions. Each region has a Regional Branch / Skills Committee including representatives from the business sectors and from a host of public bodies. It influences decisions concerning the scope and orientation of the supply of labour market training, i.e. training for workers and job seekers.

In contrast to some other member states, although Sweden has Sectoral Training Funds in some sectors, they do not play a significant role with regards to the planning and provision of continuing vocational training. CVT arrangements are made, in very general terms in the collective labour agreements, and, in specific terms at the level of individual firms.

2.4.5 Forecasting of jobs and skills needs

The main providers of information on qualitative and quantitative trends in the labour market, from a long to a short-term perspective, include:

Statistics Sweden (SCB - *Statistiska Centralbyrå*) provides with '*Trends and forecasts*' an overview of demographic developments and trends in education and training and on the labour market. On the basis of detailed projections of labour market supply and demand, areas of mismatch (excess/shortage) are identified. In the years when '*Trends and forecasts*' is not issued, a complementary forecast is published in '*Education and work*', which makes predictions for the next five to ten years. The publication comprises assessment about potential mismatches between the supply and demand for education by educational groups. A third forecast is the '*Labour market tendency survey*'. It presents short-term forecasts based on a sample of firms whose employees represent those educational groups that are considered most relevant. There are several SCB surveys about '*on the job training*'. It has to be emphasised that many of the SCB surveys cover both quantitative and qualitative aspects, e.g. the survey on working conditions. Almost all of the statistical data is presented at both national and regional levels.

The Public Employment Service (AF - *Arbetsförmedlingen*) is since January 1, 2008 the new Swedish labour market authority. It combines the National Labour Market Board and the County Labour Boards. The AF is engaged in short-term forecasts based on regular surveys and on-going contacts with employers' organisations, trade unions and other key stakeholders. The AF also carries out surveys in specific branches/sectors, e.g. in relation to temporarily layoffs and the mismatch

between supply and demand. The surveys, which are mostly occupation-based, are a minor activity within the AF.

The National Institute of Economic Research (KI - *Konjunkturinstitutet*) performs analyses and forecasts of the Swedish economy and conduct-related research. Besides monthly broad economic forecasts, KI regularly asks a minimum of 3,000 firms in the private sector for their assessment of the development of the economy (output, new orders, employment, labour shortage etc.). The objective is to provide a quick qualitative indication of actual outcomes and expectations regarding central economic variables for which no quantitative data is yet available. These surveys cover manufacturing, the building sector, and part of the private services sector.

2.4.6 Assessment of and participation in (a) European Sector Skills Council(s)

All participants consulted during the study visit expressed an interest in accessing European-level information on employment and skills needs trends in the live performance and audio-visual sectors, and in developing European collaborations. As there is no formal sector body dealing with employment and skills, Swedish participation to a European structure would need to be further discussed with social partners.

2.5 Canada

The participation of Canada in this committee grew from pre-existing relationships between the School of Graphic Communications Management and the European partners. These relationships included student and faculty cooperation in research projects and education.

2.5.1 Background information

As the world's second-largest country by landmass, Canada faces new challenges when it comes to the assessment and delivery of skills-based education for Creative Industries and cross media producers. The geographic size of the country is such that it could encompass all of the European CIGN partner countries within its boundaries. Canada is subdivided into ten provinces and three northern territories. Canada's population includes only 35 million persons. The cities of Toronto, Montreal and Vancouver each have more citizens than some of the provinces and territories. Outside of the major cities, the country is one of the most sparsely populated in the world, with the majority of citizens living and working along a shared border with the United States. Canada is an officially bilingual country (English and French) with the majority of the French-speaking population living in the province of Quebec.

Canada exhibits a population bulge in the *baby boom* generation – a group that will exit the workforce over the next ten years. The country, in anticipation of this situation, has aggressively welcomed immigrants from many other countries. Both geographic and demographic factors require innovative thinking with regards to educating a new and renewed workforce.

Although the bulk of cultural activities and cross media production are found in relative proximity to Canada's shared border with the United States, cultural activities are valued in all parts of the country. In the report *Creativity Unleashed* the worth of the Creative Industries was described thus "In Canada, the cultural sector was worth \$84.6 billion in 2007, or 7.4% of Canada's total real GDP – more than the insurance industry (\$20.8 billion), the hotel and restaurant industry (\$28 billion), or the agriculture, forestry, hunting and fishing industries (\$26.4 billion) combined." [8] A report by the Conference Board of Canada indicated that in 2007 the Cultural sector employment exceeded 1.1 million jobs.

In other words the *economic* definition of Creative Industries is that it is a sector of the global economy that is focused on creating as well as exploiting intellectual property products such as films, music, games, fashion designs, etc. and/or at providing creative services. Typically the list would include areas such as:

- Advertising
- Architecture
- Art and Antique Markets
- Crafts
- Design (objects, furniture, etc.)
- Designer fashion
- Emerging Medias (New media)
- Film and Video
- Interactive leisure software (Wii, video games...)
- Interior Design
- Music
- Performing Arts (Theatre, Dance, Musicals...)
- Photography
- Publishing
- Software and computer services
- Television and Radio

The term *Cross-Media* is may be defined as a design created and distributed in a variety of media and formats. In Canada this could be demonstrated by a marketing campaign that runs in print media and television, and is then supplemented by apps, web sites, and magazines. These media crossovers are often perceived as being new, however they combined use of traditional media with emerging technologies. In the current media-landscape¹³ consumers control the use of media; they decide when and where they wish to access specific media and content. The cross media sector itself defines the term as follows:

“The cross media-sector provides multimedia products and services by using radio, television, Internet, mobile devices, print and events simultaneously along each other.”
[9]

Education and training in Canada is organized and provided by publicly funded universities and community colleges, as well as industry organizations, labour unions, and private educational institutions. In addition, some larger corporations provide their own on-the-job training and education solutions. Each of the ten provinces and three northern territories assume responsibility for public education. Funding is provided from the government sources, from tuition fees, and from donations and endowments.

Education is a provincial jurisdiction means that curricula and research specialties are focused on the provincial or regional level. The Canadian federal government funds agencies that provide grants to artists and cultural workers, the provincial (and territorial) governments are involved in the funding and regulation of community colleges and universities, and the provincial and municipal governments oversee events related to cultural industries. Cultural industries activities are also funded by not-for-profit and private sector organizations. In the appendix of this report, please find an annotated listing of provincial and territorial references to the Creative Industries. Few mention policy, and links to formal education providers are scant.

Skills assessments are becoming increasingly important. In 2013, Employment and Social Development Canada published the report “Skills in Canada: first results from the Programme for the

¹³ <https://cmidm4.files.wordpress.com/2009/11/social-media-landscape.jpg>

International Assessment of Adult Competencies (PIAAC)". This report compares "literacy, numeracy and problem solving skills in technology-rich environments (TRE)" across the Canadian provinces along with OECD member countries.

2.5.2 Assessment of and participation in (a) Canadian Sector Skills Council(s)

Sector Skills Councils exist in Canada and predominantly serve trades and service sectors of the economy. *"The Sector Council Program (SCP) in Canada is guided by four principal objectives:*

- *Increased industry investment in skills development to promote a quality workforce;*
- *A learning system that is informed of, and more responsive to, the needs of industry;*
- *Reduced barriers to labour mobility, leading to a more efficient labour market; and*
- *Enhanced ability of industry to recruit and retain workers and to address human resources issues."* [10]

The Sector Council Program states that each council *"...provides information regarding employer expectations; hiring practices; how training is planned, developed and delivered; and, labour market conditions within that sector. They also provide information on career opportunities for the sector; apprenticeship programs; assessing foreign credentials; integrating immigrants into the workplace; developing occupational standards and certification programs; and, advancing a 'learning culture' in Canada for employers and workers alike."* [11]

The list below shows different sector councils by industry. Unfortunately, few of these have a direct relationship with the Creative Industries or cross media production:

- Aboriginal Human Resource Council
- Apparel Human Resources Council
- BioTalent Canada
- BuildForce Canada
- Canadian Agricultural Human Resource Council
- Canadian Apprenticeship Forum
- Canadian Automotive Repair and Service Council
- Canadian Council for Aviation & Aerospace
- Canadian Council of Professional Fish Harvesters
- Canadian Printing Industries Sector Council
- Canadian Steel Trade and Employment Congress
- Canadian Supply Chain Sector Council
- Canadian Tourism Human Resource Council
- Canadian Trucking Human Resources Council
- Child Care Human Resources Sector Council
- Cultural Human Resources Council
- Environmental Careers Organization of Canada
- Electricity Human Resources Canada
- Food Processing HR Council
- Forest Products Association of Canada
- Forum for International Trade Training
- HR Council for the Non-profit Sector
- Information and Communications Technology Council
- Mining Industry Human Resources Council
- Motor Carrier Passenger Council of Canada
- Petroleum Human Resources Council of Canada
- Police Sector Council

- Wood Manufacturing Council¹⁴

The Canadian Printing Industries Sector Council

This sector council was established in 2006 in response to concerns among employers related to education and training, marketing the services of the industry. In 2012 the federal government indicated that Sector Council that funding would be reduced, and then withdrawn, and it was left to individual industry groups to decide whether they could or would support the work of the councils on an on-going basis. As a result, the Canadian Printing Industries Sector Council was disbanded in 2013. The HR Toolkit developed by the Canadian Printing Industries Sector Council was later absorbed into the Canadian Printing Industries Association¹⁵ representing the pre-press, press, bindery and allied industries, where it is still available. “Among the tools and resources CPISC developed are national skill standards lists, occupational profiles, labour market information, a roadmap of industry technology, an online HR toolkit, and the Career Focus Program that co-chair Jeff Ekstein said has helped companies attract new people to the industry.” The only strong provincial Sector Council in Canada at present is situated in the province of Manitoba.

Growing Awareness of Creative Industries and Cross Media production in Canada

Schawk™ promotes cross-media services to benefit customers who are concerned about brand protection across various media. Schawk’s services include (among others), retail catalogues, product packaging, digital production, POP displays, store circulars, brand advertising and marketing collateral.

At the upcoming Design Educators forum (part of the Design Thinkers conference to be held in Toronto in November 2015), proposed themes include:

- How design curriculum can respond to the external pressures of evolving technologies, labour market demands and professional practices?
- How design schools are moving beyond traditional disciplinary boundaries and modes of communication to embrace new models of collaboration and holistic education?

Outside of the education system, there is increasing interest in cross media production. Based on a survey of topics presented at the Merging Media conferences in 2012, 2013, and 2014 it is clear that the cross-media field (or as it is sometimes referred to in the promotional brochures, “trans media”), is only partially “cross” or “trans”. Pre-media, print and post-media processes are rarely referred to. The majority of participants are involved in fields utilizing by not referred to including web development, gaming, television and video production.

In Canada, there is one university and over eight community colleges offering programs related to the printing industry. Numerous others offer programs in graphic design and other digital processes. Similar to post-secondary educational institutes in the United States, several post-secondary educational institutions in Canada view presses (and pressroom operations as being high cost (equipment, consumables, supplies and technical staff).

Cross Media Skills Education

It is important to recognize the link between cross media skills and cross media production. Although the term “cross media” is rare for course offerings in Canada, it is not an indication that courses related to the principles of cross media production do not exist. Marketing courses are strongly promoted in almost all business-related degrees in Canada. Courses in real-time personalization and variable-data printing (VDP) are also promoted, both in business schools and in technical courses related to the printing of VDP documents.

¹⁴ success.ca/index.php/partner-engagement/sector-councils

¹⁵ www.cpia-aci.ca/en/

Where cross media production and Creative Industries leadership appears to be burgeoning is in educational institutions. University of Toronto hired Richard Florida at the Rotman School of Business; Sheridan College launched a bachelor's degree in interaction design in 2014. Ryerson University launched a bachelor's degree in a modular-based Creative Industries program in 2013. OCAD University launched The School of Graphic Communications Management at Ryerson University has recently revamped its curriculum, launching in fall 2015 and will introduce the course GCM 362¹⁶: Web and Cross Media.

Other areas where cross media, and cross media education are emerging include the following:

- The American owned Shawk corporation is promoting itself on it's Canadian website as "Schawk! is a Global Cross-Media Production Agency"¹⁷
- Interactive Advertising Bureau of Canada (IAB Canada) "IAB Canada's Cross-Media Optimization Studies (CMOST) programme has, to date, conducted ground-breaking research for nine major Canadian advertisers with the help of Dynamic Logic. These studies include the following clients: Molson, RBC Insurance, General Motors, Canadian Tire, Unilever, AIM Trimark, Kal Tire, Red Bull and Tetley Tea.
- The key objectives of IAB Canada's CMOST programme are to help Canadian advertisers understand how to utilize interactive advertising within a media mix, by providing fact-based proof of how the internet works within various multi-media campaigns; and, to create a continuous ad effectiveness learning program which engages leading Advertisers, Publishers and Agencies across multiple industries, and using various types of ad creative, messaging, formats, media, timing, etc.¹⁸
- Canada Post offered the following in 2013, in partnership with Xerox, the Lowe Martin Group (private commercial printing company) and XMPie: *"The Cross-Media Campus is an industry initiative, championed by Canada Post and sponsored by industry leaders who have pledged their financial support, their influence and their expertise to expand the relationship marketing and cross-media skill-sets of marketing, advertising, digital and social agencies in Canada"* [12]. Sessions were targeted to Production staff, as well as an executive forum. Recent offerings include cross media optimization.
- A Cross Media Conference was held at Graphics Canada 2015, Canada's Largest Showcase for the Graphic Communications and Printing Industries Apr 16-18, 2015 Toronto International Centre
- The Journalism program at Ryerson University, in it's program overview (Calendar for 2015/16, states, *"Students are introduced to journalism as practised across all forms of media within the first two years, after which they may choose courses to concentrate in specific media (online, newspaper, magazine and broadcast) or gain expertise in a cross-media skill such as editing, or in a specific beat in journalism (including sports, business or international reporting)."* [13]

Although there are many engaged in Creative Industries and Cross Media design in Canada, the appearance of these terms is relatively recent.

- Creative Industries are widely accepted as being of importance for cultural, social and economic benefits across the country
- Cross media not a widely recognized term in Canada, even though many companies are producing or working in cross media environments

¹⁶ www.ryerson.ca/calendar/2015-2016/pg3897.html#328597

¹⁷ r.search.yahoo.com/_ylt=A0LEVjURKGdVmZcA.C8nnllQ;_ylu=X3oDMTE0czFxoTfnBGNvbG8DYmYxBHBvcwMyBHZ0aWQDRkZYVUkyN18xBHNlYwNzcg--/RV=2/RE=1432852626/RO=10/

¹⁸ http%3a%2f%2fwww.schawk.com%2f/RK=0/RS=Xz6qizndZylkziTd0EfrZ0fmexc-iabcanada.com/research/cmmost/

- There needs to be some organization to link the fields of Creative Industries, cross media production and education together.

3 Conclusions

The country participants in this project have identified the following conclusions from the research conducted for this report:

- The participating countries all identify the importance of the Creative Industries for their economic, social and cultural benefits
- The development of sector skills councils related to the Creative Industries is non-existent in Sweden and Germany, disappearing in Canada, disguised as sector funds in Belgium and strongest in Scotland/United Kingdom.
- It should be noted that one of the most valuable assets of a strong sector skills council is the ability to gather labour market intelligence about the sector(s) they represent. In the countries where Sector Skills Councils are non-existent, it remains to various unconnected federal/regional or industry-based agencies to gather information and create forecasts.
- In some countries the terms “cross media” are not yet fully understood, particularly in the context of job skills.

In addition, the partners determined the following:

- The need for a better, globally accepted definition and understanding of cross media production and what it entails.
- The need for a global description of what a cross media curriculum includes (goals, projects outcomes) and discussion about how this is delivered (on site or online), and how it is administered.
- There is a strong need for government agencies (SSCs), industry, educational institutions and labour unions to work together to identify cross media jobs of the future, and to decide how to educate, train and cross-train graduates as well as current employees to fill them.

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Appendix

British Columbia

- Creative BC, British Columbia's Creative Catalyst, <http://www.creativebc.com/>, The only mention of education refers to the film/movie industry.

Saskatchewan

- Association of Creative Industries of Saskatchewan, <http://www.culturalindustries.sk.ca/>
- Moving Saskatchewan's Creative Industries Forward -Building a Long-term Strategy, <http://www.pcs.gov.sk.ca/MovingSaskatchewanForward>
- Saskatchewan funds a new creative industries agency, signalling an end to SaskFilm: <http://www.theglobeandmail.com/arts/film/saskatchewan-to-fund-new-creative-industries-agency-signalling-an-end-to-saskfilm/article8676463/>

Manitoba

- Economic Development Winnipeg: <http://www.economicdevelopmentwinnipeg.com/key-industries/creative-industries>

Newfoundland

- Government of Newfoundland Entrepreneurship and Innovation – Cultural Industries, <http://www.government.nl/issues/entrepreneurship-and-innovation/investing-in-top-sectors/creative-industry>
- Creative Industries fund NL, <http://www.stimuleringsfonds.nl/en/>

New Brunswick

- Creative Futures—A Renewed Cultural Policy for New Brunswick: <http://www2.gnb.ca/content/dam/gnb/Departments/thc-tpc/pdf/Culture/2014CulturalPolicy.pdf>
- Brief from the New Brunswick Arts Board (artsnb), http://www.parl.gc.ca/Content/HOC/Committee/411/FINA/WebDoc/WD5138047/411_FINA_PBC2011_Briefs%5CNew%20Brunswick%20Arts%20Board%20E.html

Nova Scotia

- Film and Creative Industries Nova Scotia Act, <http://nslegislature.ca/legc/statutes/film%20and%20creative%20industries%20nova%20scotia.pdf>
- Nova Scotia CAN: Building the Creative Economy in Nova Scotia, http://www.creativecity.ca/database/files/library/ns_can.pdf

Prince Edward Island

- http://www.culturepei.ca/pdfs/Andrew_Terris_CulturePEI_Sept_24th_Forum.pdf

Quebec

- The Creative Economy and the English Speaking Communities in Quebec (ESCQ), <http://www.ic.gc.ca/eic/site/com-com.nsf/eng/01270.html>, (Note: This web site also includes links to a number of relevant policy papers.)
- LES INDUSTRIES CRÉATIVES: catalyseurs de richesse et de rayonnement pour la métropole <http://www.qftc.ca/uploads/files/PDF/btmm-creative-industries.pdf>

Yukon Territory

- Cultural Industry Training Fund: http://yukonartscentre.com/programs/cultural_industry_training_fund

Canada

- Strengthening Canada's Digital Advantage, Quarterly Monitor of Canada's economy http://www.ictc-ctic.ca/wp-content/uploads/2014/02/ICTC_SCD_A_Winter2014_EN.pdf