



RECOVERY AND RESILIENCE SCOREBOARD

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Thematic analysis

Culture and Creative Industries

April 2022



This paper is part of a series of thematic analyses undertaken by the European Commission to illustrate the impact of the Recovery and Resilience Facility (RRF). The RRF is the European Union's largest ever funding instrument and is intended to support European economies and societies to recover from the Covid-19 pandemic and build resilience against future shocks. EU Member States commit to implement ambitious reforms and investments and receive funds from the RRF when they achieve these commitments.



Policy Overview

The cultural and creative sectors and industries, also referred to as the cultural and creative industries ecosystem, are drivers of jobs, economic growth, social fairness and sustainable development. The sector employs 8.02 million people, represents 3.95% of the EU value added (EUR 477 billion) and involves 1.2 million companies, out of which 99.9 % are SMEs¹.

The COVID-19 crisis has had a devastating impact on the majority of these sectors. The halt of cultural activities, the closure of museums, libraries, archives, galleries and heritage sites, the cancellation of events, festivals and tours, as well as art, design and fashion fairs and trade shows, led to significant losses of revenues across the EU, with a 70% drop in box-office sales in 2020 for cinema operators, 76% drop in attendance at music venues, and up to 75-80% losses for museums (in popular touristic regions). In addition, televisions suffered a drop in advertising revenues of 20%, while news publishers reported up to 80% loss during the lockdowns in the same year². Only the video games industry reported a significant increase in turnover for major EU players in 2020.

Over the past years, EU policy action in the field of culture has been guided by the priorities defined in strategic documents, especially in the Commission's European Agendas for Culture³ and the Work Plans for Culture⁴. Furthermore, the EU Industrial Strategy⁵ identified the culture and creative industries ecosystem as one of the 14 industrial ecosystems for inclusive and sustainable recovery as well as the green and digital transition of the EU economy.

Since early 2020, due to the devastating impact of the coronavirus pandemic on culture, the relevant policies have focused primarily on alleviating the consequences of the crisis and supporting the sectors' recovery, namely by mobilising an unprecedented amount of general and targeted funding. In December 2020, the Commission adopted its "Media and Audiovisual Action plan"⁶, proposing measures to accelerate the recovery, transformation and resilience of the media and audio-visual industries and to address their structural challenges. In June 2021, the Commission issued EU guidelines on the safe resumption of activities in the cultural sector⁷. In November 2021, the first interactive EU funding guide for Culture (CultureEU⁸) was launched to help the sector navigate through various funding opportunities.

While the COVID-19 crisis has accelerated the digital transformation and technological developments, which are full of potential in terms of content creation, improved accessibility to services and goods, and interaction with end-users, these are not yet fully exploited by all actors in the creative value chains. Access to technology remains difficult or costly, especially for small players. The actors of the cultural and creative

¹ [Annual Single Market Report 2021](#).

² See relevant references in the [Annual Single Market Report 2021](#).

³ [Communication a European agenda for culture in a globalizing world](#) COM/2007/0242 final and Communication [A New European Agenda for Culture](#) COM/2018/267 final

⁴ The Council Work Plan for Culture (2019-2022) sets out the following priorities for European cooperation in cultural policy-making: sustainability in cultural heritage, cohesion and well-being, an ecosystem supporting artists, cultural and creative professionals and European content, gender equality, international cultural relations and culture as a driver for sustainable development, as well as cross-sectorial issues such as digitalisation and cultural statistics.

⁵ [Communication Updating the 2020 New Industrial Strategy: Building a Stronger Single Market for Europe's Recovery](#). COM/2021/350 final

⁶ COM(2020)784 Final – Communication of the Commission to the Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - "Europe's Media in the Digital Decade: An Action Plan to Support Recovery and Transformation".

⁷ [Communication EU guidelines for the safe resumption of activities in the cultural and creative sectors](#)

⁸ <https://culture.ec.europa.eu/funding/cultureeu-funding-guide>

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industries need to increase efforts to develop new content formats, services and business models. The crisis has also exacerbated the underlying fragmentation, underinvestment and insufficient access to finance for small actors.

The cultural and creative sectors face structural challenges, in particular with regard to the working and living conditions of artists, cultural and media professionals, and the fragility of creative enterprises, the majority being small and micro-enterprises. Artists and professionals often have precarious job contracts and a high rate of self-employment. The cultural and creative sector also suffers from the lack of skills needed in the labour market.

Culture, creativity and media can play a crucial role in enhancing social cohesion and well-being as well as sustainable development. They are a powerful force for bringing people together, foster community regeneration and improve health and wellbeing, as demonstrated during the COVID-19 crisis. Creative entrepreneurship also has an enormous potential to boost resilience, innovation, open new business opportunities, and strong spill-over potential to foster transformational change.

Culture and creative industries in the recovery and resilience plans

Overview of the plans

In line with the above-mentioned Communications and other policy guidelines, Member States have included in their recovery and resilience plans a range of reforms and investments to support the resilience of the cultural and creative industries and to drive their green and digital transition. Member States will use the resources of the facility to finance important reforms and investments supporting restructuring and modernisation of the cultural and creative sectors and industries and enhancing their resilience for the future.

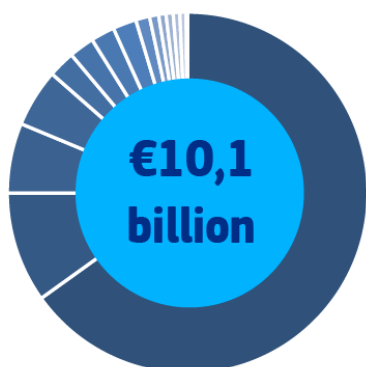
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Total expenditure on culture per Member State

EUR in millions



Italy, € 6589	France, € 1002	Greece, € 633	Spain, € 525
Portugal, € 243	Slovakia, € 229	Czechia, € 216	Romania, € 213
Croatia, € 126	Belgium, € 83	Austria, € 66	Lithuania, € 65
Finland, € 60	Slovenia, € 57	Cyprus, € 8	Latvia, € 6

The measures directly supporting culture and the creative industries have a total value of EUR 10.121 billion⁹, representing approximately 2.3% of the total expenditure of the 22 adopted recovery and resilience plans. Overall, 16 out of the 22 recovery and resilience plans endorsed by the Council (by March 2022) include measures targeting culture and the creative industries. The scope of reforms and investments covers a wide range of areas, from supporting the green and digital transition of the cultural and creative sectors and industries, to measures fostering innovation and internationalisation and cultural measures promoting social cohesion.

Various countries have included important legislative reforms to improve the working conditions of artists and cultural workers (CZ, EL, RO, ES)¹⁰ or to reform the funding system of the cultural sector or institutions (RO, CZ). Several reforms will embrace the digital and greening opportunities by introducing minimum environmental criteria for cultural events (IT) or developing a national digitalisation strategy for cultural heritage (AT).

Member States have envisaged several measures to ensure the digital transition in the cultural sector. The measures include support to the digitisation of the cultural and media sectors and the production and distribution of digital content (BE, FI, LV). Also, investments are planned for digitisation of cultural heritage and major cultural services (ES, LT, PT, SI, CZ) to improve the accessibility to culture. Attention is also given to capacity building of cultural actors and operators by providing them with digital skills, supporting the digital transition (IT, CZ).

The green transition in the cultural sector is supported in many Member States by renovations aiming to increase the energy efficiency in cultural buildings and cultural heritage (HR, IT, PT, SK) or by safeguarding the cultural heritage sites against climate change (EL). Also, incentives, such as investment funds, are created for green and climate-friendly projects by cultural actors (AT, FR).

⁹ Amount based on the pillar tagging methodology prepared by the Commission in consultation with the Member States. The figure corresponds to the measures allocated to the policy area "Cultural sector" as primary or secondary policy areas, which includes to a great extent measures contributing to tourism.

¹⁰ The country examples here and hereafter are for illustration purposes only and do not constitute an exhaustive list of countries.

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Supporting the competitiveness, innovation and internationalisation of culture and creative industries, the planned measures include strengthening the competitiveness of cultural industries (ES, HR) or introducing a scheme of creative vouchers to support innovation (CZ). The audio-visual sector will be reinforced by dedicated programmes for the promotion and modernisation of the sector, improving the access to finance (ES), and intellectual property regulations and management (ES). Several countries are promoting skills and education in the cultural sector by upgrading higher education for arts and upskilling for creative and cultural professionals (EL), or modernising cultural higher education establishments (FR).

In addition to measures directly targeting the cultural sector, culture and creative industries will also benefit from a larger pool of measures that have a wider policy focus. Measures such as green construction, digitalisation of small and medium-sized enterprises, financial instruments open to all companies or digital skills trainings of workers will also be open to professionals and companies active in the cultural sector. In some cases, these measures will also increase demand for their services.

Several Member States have envisaged support to the creation and promotion of cultural offer by financing the creation and production of cultural content, fostering cultural tourism and increasing the attractiveness of the territories. For example, schemes to support art creation (FR), project financing for film and audio-visual works (FR, RO), establishing cultural routes at emblematic archaeological sites and monuments (EL), increasing attractiveness of small historic towns (IT), promoting the touristic/cultural routes (RO, CY) and support revitalisation and modernisation of cultural heritage that has a multiplier effect on sustainable tourism development (SI). Other measures include giving access to culture across the country, such as the development of regional cultural and creative centres (CZ) and boosting culture across the territory (ES).

Some Member States have planned innovative actions to enhance access to culture and harness the power of culture for social cohesion and well-being. For example, national plans include measures to improve access to culture for people with disabilities (LT) or in culturally deprived areas (RO, CZ), promote social cohesion and tap on the silver economy by improved access to art (EL), and remove physical and cognitive barriers in museums, libraries and archives to enable wider access to and participation in culture (IT).

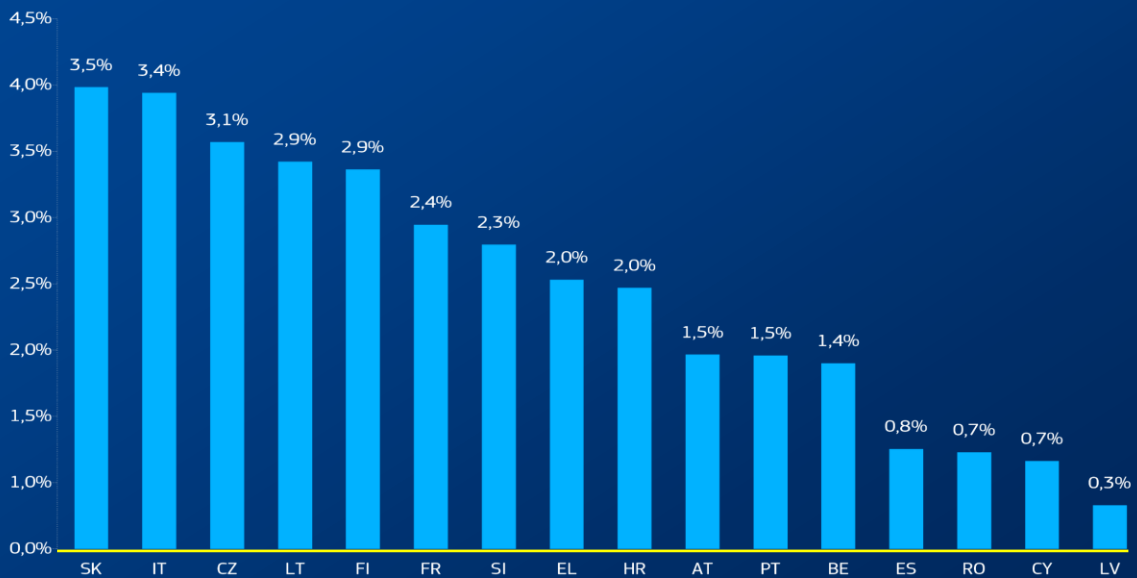
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Share of expenditure on culture

% of total estimated cost per Member State



Note: This chart shows estimated expenditure based on the pillar tagging methodology for the Recovery and Resilience Scoreboard and corresponds to the measures allocated to the policy area "Cultural sector" as primary or secondary policy areas.

Good practices

 **Austria will set up an investment fund to accelerate the green transition of the cultural and creative sectors and industries.** The aim is to provide support to cultural institutions, services and cultural businesses for investments in a more ecological design of their operational structures. In addition to the investment fund for climate-friendly business and to the environmentally conscious renovation of two historic buildings (EUR 35 million), a reform for the development of a building programme to establish a framework for 'Baukultur' - combining high quality architecture with environmental targets - and a series of social, ecological, economic and cultural elements are planned to be set up.


 **Several of the RRP's include reforms aimed at improving the status of artists or changing the legislation.** For example, the **Czech** recovery and resilience plan will introduce a status of the 'artist' and the corresponding legislative changes. The reform will also include a grant scheme aiming at developing skills by focusing on digital, financial and management skills, cultural innovations, internationalisation and linking art and culture with the educational sector.

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 **Greece has taken a comprehensive approach with multiple innovative measures, among them the investment “Culture as a driver of growth”.** The investment includes sub-projects to support regional strategies and local craft ecosystems, broaden the use of archaeological sites and monuments as venues and events sites, support the digital transformation of culture and creative industries, and promote the film industry and the Greek cultural brand and trade. In addition, another investment aims to promote interventions using arts and culture to support recovery from mental health issues and facilitate access to cultural venues by visitors over 65, as well as visitors with disabilities.

 **The Spanish recovery and resilience plan includes an ambitious programme for the promotion, modernisation and digitalisation of the cultural services as well as the audio-visual sector.** The plan foresees making the ecosystem accessible, attractive and future-proof through the digitalisation of cultural services (digitising some collections from museums and libraries, digital access to public archives) as well as the integration of digital technologies in the audio-visual productions. In addition, the competitiveness of the sector will be enhanced through up-skilling (specialised training for sector’s representatives), support for cultural accelerators and fostering the internationalisation and attractiveness of the audio-visual sector for external investment.

Country overview

The figures provided in the Country overview are based on the pillar tagging methodology for the Recovery and Resilience Scoreboard and correspond to the measures allocated to the policy area “Cultural sector” as primary or secondary policy area. 16 out of 22 recovery and resilience plans approved by the Council by March 2022 include measures in this policy area. For all Member States, the listed relevant components are based on the Council Implementing Decision.

Austria

Allocation: EUR 66.5 million. Relevant component: 4.C

Under the ‘Just Recovery’ component, Austria has planned a series of measures favouring the green transition in the cultural sector. They include the renovation of the Volkskundemuseum Wien and Prater Ateliers, aimed to demonstrate how to combine a living building culture with environmentally conscious monument protection, to attract new audiences as well as facilitate artistic exchanges and skills’ enhancement through co-creation and promotional activities across the museum. Additionally, an investment fund for climate-friendly business, a reform for the development of a building programme to establish a framework for ‘Baukultur’ - combining high quality architecture and built environment targets, and a series of social, ecological, economic and cultural components is planned to be set up. On the digital side, the plan also envisages the development of a national digitisation strategy across cultural and artistic sectors and investments for digitisation in cultural institutions.

Belgium

Allocation: EUR 82.9 million. Relevant components: 1.1 and 2.2

With a strong digital focus, the Belgian Recovery and Resilience Plan includes measures to support the cultural and media sectors and equip them with tools for the digitalisation of audio-visual and audio works. Furthermore, the Plan will support the creation of 100% digital events, such as music and exhibitions, with the aim of enabling artists and cultural partners to gain access to new markets and of increasing access to culture for people and groups located remotely or facing mobility challenges. Energy performance is another key aspect of the Belgian Plan, with measures aimed at the energy efficient renovation of cultural public buildings.

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Croatia

Allocation: EUR 125.5 million. Relevant components: 1.1, 2.2 and 6.1

The Croatian plan covers the culture and creative industries through both investments and reforms. These will support the sectors' digitisation and resilience, improve legal certainty and business processes through the reform of the copyright framework for the creation of online platforms and applications and the establishment of new digital public service (a digital conservation base). The investments will include renovation of cultural heritage and historical buildings, while increasing their energy efficiency.

Cyprus

Allocation: EUR 7.98 million. Relevant component: 3

The planned investments to support culture and creative industries in the Recovery and Resilience Plan for Cyprus, address the authentication of Cypriot products and services, in particular concerning traditional foods and the country's tourist destinations. Additional investments support creative manufacturing sectors, such as: arts, handicrafts and traditional products through small restorations and the repurposing of private and public buildings. All relevant investments belong to component 3 'New growth model and diversification of the economy', which addresses the challenges of the Cypriot economy with regards to competitiveness, productivity and investment, as well as overreliance on certain economic sectors, such as tourism. The above amount includes an investment to enhance the database of traditional Cypriot products.

Czechia

Allocation: EUR 215.7 million. Relevant components: C1.4, C4.5

The Czech plan includes a component exclusively dedicated to the development of the cultural and creative sector. It includes measures to ensure the equitable development of the sector across the territory with the creation of 15 cultural and creative centres, to support digitalisation of cultural content, to ensure its preservation and accessibility, and to promote innovation through a scheme of creative vouchers. The

component also includes reforms to adopt the status of the artist and foster financial stability and sustainability of cultural institutions. Under a different component, the Central European Digital Media Observatory will be established.

Finland

Allocation: EUR 60 million. Relevant component: P3C4

The Finnish Recovery and Resilience Plan includes one large investment covering the cultural and creative industries under the component 4 'Strengthening competitiveness and boosting growth in crisis-impacted sectors'. The measure focuses explicitly on the renewal of the cultural and creative sectors. 75% of the financial support provided under this measure will target the development of innovative service, production and operating models of companies and organisations and strengthen international competitiveness for both sectors and entities related to culture and creativity. The remaining funds (25%) will support innovation and new cooperation in companies in the creative economy through the implementation of pilots. The above amount also includes measures supporting sustainable tourism.

France

Allocation: EUR 1 billion. Relevant components: C6, C7

The French Recovery and Resilience Plan includes a programme for supporting the culture and creative sectors and industries by accompanying the recovery of this ecosystem.

The first component of 'Technological sovereignty and resilience', includes measures to finance projects falling under the strategy for cultural and creative industries (as part of the six 'acceleration strategies'), which intends to develop digital content production and support technological innovation, digital creation and dissemination. The objectives are to double the current pace of transition from small and medium to intermediate sized for cultural enterprises, to increase the export turnover and deploy cultural hubs to irrigate the pilot territories.

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Under the second component 'Digitalisation of State, territories, enterprises and Culture' a series of measures will support the renovation of cultural heritage (cathedrals and monuments) and promote craftsmanship and know-how. Specific investments for artistic employment and training modernisation are planned with actions such as an ecological transition fund, a plan to modernise cultural higher education establishments and a programme to support creation in all disciplines. Finally, targeted investments are envisaged for the press, cinema and book sectors.

Greece

Allocation: EUR 633 million. Relevant components: C[4,6], C[1,2]

The measures allocated in Greece's plan to the support of culture maintain the strong focus on the green and digital transition. Planned investments and reforms deal with the central themes of labour and social security for the cultural and creative sectors, the promotion and restoration of cultural heritage sites, the accessibility of cultural sites and artistic venues to a wider audience (i.e. individuals with disabilities), skills building and arts education, social cohesion and well-being, cultural tourism, as well as the upgrading of energy efficiency in buildings dedicated to culture, such as museums and theatres.

The investment under 'Culture as a driver of growth' aims to promote the contribution of culture to smart and sustainable growth, and economic, social and territorial cohesion. It consists of several subprojects whose aims span from providing support to cultural and creative industries regional strategies, and creating culture-centric regional growth ecosystem and generating jobs, to the developing and upgrading of cultural venues, services and experiences. It equally aims to broaden the use of archaeological sites and monuments as venues and events sites; to provide support to the digital transformation of CCIs and the development of digital models of cultural production and distribution; to promote, among other things, the film industry as a driver of growth and creativity; and eventually to promote Greek cultural brands and trade.

Italy

Allocation: EUR 6.6 billion. Relevant Component: C[M1C3]

Under the Component dedicated to "Culture and Tourism", the sectors mostly affected by the pandemic, the Italian Recovery and Resilience Plan's measures target the cultural sector through digital platforms, strategies for skills' enhancement on cultural heritage, as well as removal of physical barriers in museums, libraries and archives, to enable wider access to and participation in culture. Key expected outcomes are to increase the resilience of cultural professions and the contribution of the cultural sector to ecological and green deal objectives.

Several measures aim at tackling the effects of climate change on cultural goods and sites, putting in place capacity-building actions for cultural operators to manage the digital and green transition, and reducing the environmental impact of cultural activities. To increase the attractiveness of the cultural ecosystem through the modernisation of both material and immaterial infrastructure, other measures combine strong focus on the digitalisation of cultural heritage from archives, libraries, museums and cultural places, with new forms of access and use by citizens and operators including the development of a cloud and software infrastructure for digital resources.

An overall culture-led regeneration of smaller cultural sites and rural heritage is planned, with a view to social cohesion and to fostering inter-disciplinary skills. Significant investments for Cultural and Creative Industries 4.0. will address cinema, theatre, and other value chains linked to arts and craft, through key initiatives such as the Cinecitta' project and other strategic hubs for cultural assets and historic venues, as well as cultural routes and natural areas. The above amount includes measures to support tourism, as well as measures for the digitization of national parks and marine protected areas.

Latvia

Allocation: EUR 5.7 million. Relevant component: 2

The Latvian plan includes an investment on the digitalisation of the industries, particularly the digital transformation of the media sector and the support for uptake of innovative technologies and approaches, such as artificial intelligence and machine learning. They will facilitate the adaptation of media companies to modern media consumption trends as well as support the sustainable development of public media and the library, museums and culture monuments protection

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processes through digital solutions. In addition, Latvia has also envisaged measures to support the modernisation and digital transition of the public administration, including systems or solutions for libraries, museums and culture monuments protection processes and public media sustainability processes.

Lithuania

Allocation: EUR 65 million. Relevant component: 3

One investment, including two sub-measures, supports the culture and creative industries under the Lithuanian Recovery and Resilience Plan. The aim of the investment is to facilitate the development and deployment of advanced and innovative tools and artificial intelligence solutions for science and business to better communicate, read, analyse, understand and interpret the Lithuanian language. Additionally, the investment will include measures in the field of publishing digital culture to improve access to culture by people with disabilities and facilitate reuse of cultural and cultural heritage content, with at least twelve projects for the digitisation, accessibility and dissemination of cultural resources.

Portugal

Allocation: EUR 243.3 million. Relevant components: C04

The Portuguese plan counts one component dedicated to Culture with two main measures. The first, Cultural networks and Digital Transition, aims at upgrading the technological infrastructure of public cultural establishments to foster their digital transition, for example by purchasing digital cinema and video projection equipment. The action involves the digital preservation of artworks and cultural heritage, improving the cultural experience and raising demand for cultural activities and reaching new audiences, especially the new generations. These measures are expected to increase the resilience of the sectors with the promotion of new business models and support to cultural areas with a strong technological component. The second measure, Cultural Heritage, has as objective the renovation of cultural heritage to adapt to the new environmental standards and the protection of artisan techniques and professions, for example, by the creation of a catalogue of activities and the installation of

laboratories and routes from the 'Saber Fazer' Technological Center initiative.

Romania

Allocation: EUR 213.1 million. Relevant components: C5, C11

Several measures in the Romanian plan aim at preserving, promoting and revalorizing cultural heritage with the creation of 12 thematic cultural routes, the modernisation and creation of museums and memorials and a reform for the operationalisation of destination management organisations, including an action plan for the valorisation of cultural heritage. In addition, the plan envisages specific interventions to increase access to culture in disadvantaged municipalities, with pilot projects to support local cultural programmes and to finance education projects. Romania also plans to develop a digital system for the award of public funding in cultural sectors and a reform of the funding system to create a sustainable framework for the private/independent cultural sector; the reform comprises new legislation on the statute of the cultural workers. Other investment aims at strengthening the capacity of micro, small and medium sized enterprises in film production and accelerating the digital transition of film producers and distributors. Another measure will tackle the challenges of the energy renovation of historic buildings and resource efficiency, through an interdisciplinary and integrated approach implementing the principles of sustainability and circular economy, in line with the National Strategy for the Protection of Historical Monuments. The allocation above does not include specific investments on skills and training for circular economy and increased energy efficiency of historic buildings.

Slovakia

Allocation: EUR 229.2 million. Relevant components: 2, 5

The cultural and creative industries in Slovakia's Recovery and Resilience Plan are supported through both reform and investment. The reform aims at improving the decision-making process of the Monuments Board of the Slovak Republic while, in addition, reforming the mapping of state-owned monuments by assessing their technical, construction

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and energy-related aspects. The investment's objective is to improve the energy performance and structural conditions of the historical and listed public buildings while protecting the historical and cultural values. The investment is expected to result in the renovation of around 100 buildings. The plan includes also an investment to support adaptation of regions to the climate change and to promote cultural heritage.

Slovenia

Allocation: EUR 56.9 million. Relevant components: 7, 11

The investments supporting the cultural and creative industries in the Slovenian Recovery and Resilience plan address digitalisation in the field of culture, with the objective of increasing the accessibility of cultural heritage, optimising the processes to declare cultural monuments, and supporting e-archiving. Investments also support the sustainable restoration and revitalisation of cultural heritage and public cultural infrastructure throughout the country with the aim of supporting sustainable tourism.

Spain

Allocation: EUR 525 million. Relevant components: C24, C25

The Spanish plan contains measures targeting the culture and creative sectors and industries with the aim to modernise them and to strengthen their competitiveness as well as their accessibility. While component 24 provides for a broader, cross-sectorial approach, component 25 focuses on the audio-visual industries. Measures include investments to boost culture and facilitate access to it across the territory, digitise and promote major cultural services and develop cultural products and new artistic formats by encouraging innovation and entrepreneurship.

Significant investments are additionally planned in the audio-visual sector to promote its modernisation and digitalisation. The measures aim also to promote its internationalisation and to attract foreign direct investment.

Moreover, the plan comprises key reforms to address the specificities of the cultural sector and will address the challenges linked to the status of the artist (labour

and tax laws, copyright and related rights) and will help to encourage investments in the sector.

Under Component 2, new legislation will be passed to declare the quality of architecture and buildings as a public good, improve the quality of life, promote architecture's social roots and the sustainable development of urban areas and hubs, contribute to economic and social development, and protect and safeguard the cultural and natural heritage.