



# Representativeness of the European social partner organisations: Live performance industry

## Executive summary

### Introduction

This study aims to provide the necessary information to encourage sectoral social dialogue in the live performance sector. The EIRO series of representativeness studies, carried out at the request of the European Commission, sets out to identify the representative social partner associations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU). The study thus identifies the relevant national social partner organisations in the live performance sector via a top-down approach (listing the members of the European affiliations) and a bottom-up approach via the national correspondents from the European Industrial Relations Observatory (EIRO).

The effectiveness of European social dialogue depends on the representativeness of the sector's relevant national actors – only sufficiently representative associations can be parties to European social dialogue.

A **national association** is considered to be a relevant sector-related interest association if it meets the following criteria:

- a) the association's domain relates to the sector;
- b) the association is either regularly involved in sector-related collective bargaining and/or affiliated to any relevant European interest association.

A **European association** is considered to be a relevant sector-related interest association if it is on the Commission's list of interest organisations to be consulted on behalf of the sector under Article 154 of the TFEU and/or participates in sector-related European social dialogue and/or has requested consultation under Article 154.

### Defining the sector

For the purpose of this study, the live performance sector is defined in terms of the Statistical Classification of Economic Activities in the European Community (NACE) (Rev. 2), to ensure the cross-national comparability of the findings. More

specifically, this sector is delineated by NACE code R.90 (Creative, arts and entertainment activities).

### Economic background

#### Employment characteristics

The live performance sector encompasses the performing arts, support activities to performing arts, artistic creation and operation of arts facilities. Live performance activities thus take place in both the public (still prevalent in most countries) and the private (subsidised or commercial) sectors.

According to Eurostat's Labour Force Survey 2012, the European live performance sector employs around one million people. However, the sector's labour market is highly fragmented. In the traditional, large cultural establishments owned and funded by the state, employees tend to be employed as public servants or on regular, long-term employment contracts, with stable social protection. Yet, there is an increasing number of freelancers and contract workers, particularly younger workers, who can be subject to inadequate social protection and precarious working conditions.

#### Recent developments

In all of the 13 Member States but three (Czech Republic, Netherlands, Romania) with available data, the number of companies increased during the period 2000–2010. However, it is uncertain whether this growth reflects a general expansion of the sector or is part of the fragmentation of the sector's company structure.

Eight of the 10 countries with data recorded an increase in the sector's overall employment in the same period, while in Portugal and Slovakia employment fell. The share of the sector in aggregate employment was below 1% in all countries with data and below 0.5% in more than half of the countries.

Like many other sectors, live performance has suffered considerably from the recent economic

recession in a number of countries insofar as state subsidies for cultural institutions have been cut and staff in publicly run institutions have been laid off. However, overall, the sector appears to have suffered less from the crisis in terms of employment than most other industries. Employment remained relatively stable in 2008–2012, generally oscillating between slightly below and slightly above one million.

## National level of interest representation

### Trade unions

The trade union landscape in the live performance sector is quite fragmented, characterised by a proliferation of occupational trade unions with very narrow membership domains. The high incidence of small, sector-related trade unions focusing on a particular occupational subgroup may be because the sector is highly differentiated in terms of traditional and distinct occupations such as actors, dancers, musicians, freelance journalists and technicians.

A total of 116 sector-related trade unions were identified across the Member States covered by the study; all Member States have at least one sector-related trade union.

Several characteristics of the sector are generally unfavourable to union member recruitment: the prevalence of insecure contracts and precarious working conditions; the often highly dispersed nature of employment; the widely diverse levels of pay; and the high presence of non-standard, part-time work. The absolute numbers of union members differ widely, ranging from about 2.1 million (Germany's ver.di) to only around 40 (SYTHOC-OHO in Cyprus). This variation reflects differences in the size of the economy and the comprehensiveness of the membership domain rather than the ability to attract members.

### Employer organisations

Unlike the trade union side, sector-related employer organisations are not documented for all Member States. In seven countries, there was no sector-related employer organisation matching at least one of the two criteria for inclusion. At least one sector-related employer organisation was found in the other 20 countries. In six of this latter group of countries, at least one employer organisation was identified which is not a party to collective bargaining. These associations are classified as social partner organisations only because of their affiliation to the Performing Arts Employers Associations League Europe (PEARLE\*). In the other 14 countries with one or more sector-related employer

organisations, at least one was engaged in sector-related collective bargaining.

Membership domains of the employer organisations tend to be even narrower than those of the trade unions. According to the figures available, a sectoral density of 5% or below is reported by more than 90% of employer organisations in terms of companies and about 43% of them in terms of employees.

### Collective bargaining

Collective bargaining coverage in the sector is relatively low, but tends to be higher in the public and state-funded segment of the sector than in the commercial one.

Seven of the 20 countries with data had a high coverage rate of around 80% or more in 2010–2011. In eight countries, the coverage rate was around 30%–70%. A third group of five countries had coverage rates of 20% or below.

## European level of interest representation

The live performance sector organisations listed by the European Commission as social partner organisations to be consulted under Article 154 of the TFEU are PEARLE\*, representing employers, and the European Arts and Entertainment Alliance (EAEA), representing employees. The EAEA consists of the International Federation of Musicians (FIM), the International Federation of Actors (FIA) and the European Federation of Media, Entertainment and Arts International (EURO-MEI).

EURO-MEI has 36 direct sector-related affiliations in 20 Member States, with 32 of them participating in sectoral collective bargaining; FIA has 36 direct members in 24 Member States, with 29 participating in sectoral collective bargaining; FIM has 31 direct members in 22 Member States, with 27 participating in sectoral collective bargaining.

According to the country reports, PEARLE\* has 37 direct associational members in 18 Member States, 29 of which participate in sector-related collective bargaining.

## Conclusions

Compared with all other European social partner organisations, the study concludes that the EAEA and PEARLE\* are the most important EU-wide representatives of employees and employers within the live performance sector.

### Further information

The report *Representativeness of the European social partner organisations: Live performance industry* is available at <http://www.eurofound.europa.eu/eiro/studies/TN1202038S/index.htm>

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