

Research Results of Perform Europe

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Research Results of Perform Europe

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Executive Summary

MAIN INSIGHTS FROM THE MAPPING

Perform Europe is an EU-funded project which aims to rethink cross-border performing arts presentation in a more inclusive, sustainable and balanced way. The ultimate goal of Perform Europe is to design a future support scheme for cross-border touring and digital distribution of the performing arts in Creative Europe countries.

Perform Europe acknowledges the many values and importance of cross-border touring and presentation of the performing arts - both for the sector and for audiences. We are also highly aware of the multiple challenges and pressures that have been hindering the European touring landscape for many years, many of which have been exacerbated by the Covid-19 reality. In this context, Perform Europe is set up as a collective learning and development process, aimed at exploring and testing more sustainable, balanced and inclusive practices.

In the first six months of the Perform Europe journey, we began our research to shed light on the current state of cross-border presentation of performing arts in 40 Creative Europe countries and the UK. This mapping exercise did not only cover current trends and developments in the performing arts practices; it also captured the diverse ways in which cross-border distribution is supported at various levels: local, regional, national and supranational. Through different research steps – conducting a large-scale sectoral survey, establishing a network of 41 country correspondents, undertaking 25 interviews and running a series of workshops - a “gap analysis” was developed. This analysis investigated the gaps between the current state of affairs and a vision for a more sustainable practice, jointly outlined with performing arts professionals from 41 countries. This gap analysis served as solid ground for the further development of the Perform Europe process.

Mapping the flows of cross-border presentation

The Mapping started out with a quantitative cartography of the “flows” in the cross-border presentation of performing arts works. Solid data for such a quantitative sectoral mapping are lacking. Therefore, we undertook an experimental cartography based on the results of the sectoral survey and an innovative web scraping experiment, using Facebook Events data provided by our survey respondents. This information sheds light on interregional¹ asymmetries and imbalances in the current touring and distribution landscape of the 41 countries that were the main focus of our research. For instance, artists and companies from Western and Southern European countries are quite active in cross-border touring and presentation - not only within their own macro-regions, but also beyond - throughout the whole Creative Europe territory, as well as outside of the Creative Europe region. In Northern and Eastern Europe, we see that there is a significant cross-border exchange of performing arts works, but mainly within their own macro-regions. In comparison, the situation in the Balkans, the Eastern Partnership countries and Tunisia is characterised by much less cross-border traffic, which mostly happens within their own macro-regions.

1 The 41 countries were divided into six macro-regions: **Balkans:** Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia; **Eastern Europe:** Bulgaria, Poland, Czech Republic, Romania, Hungary, Slovakia, Slovenia, Croatia; **Eastern Partnership:** Armenia, Georgia, Moldova, Ukraine, + Tunisia; **Northern Europe:** Denmark, Estonia, Finland, Iceland, Latvia, Lithuania, Norway, Sweden; **Southern Europe:** Cyprus, Malta, Italy, Greece, Spain, Portugal; **Western Europe:** Austria, Belgium, Luxembourg, Germany, France, the Netherlands, UK, Ireland

Apart from these geographical imbalances, we also observed some key differences between the performing arts disciplines. Professionals working in dance, circus and street arts have a slightly more international outreach than their theatre counterparts. This could be related to several factors, for example that circus, street art and dance are less language based than theatre productions. Moreover, in many countries the internal market for these disciplines is quite small. This stimulates many dancers, street artists, circus artists and companies to pursue their international careers in search of sustainable artistic and organisational practices and perspectives.

These asymmetries resonate with the way cross-border touring and presentation are supported by funding schemes and policy initiatives on a local, regional and national level. An exhaustive listing of funding and support schemes in the 41 countries – compiled by Perform Europe’s network of country correspondents – shows that more than 50% of the 565 identified support schemes originate in Northern and Western European countries. Furthermore, an evaluation of these schemes by the country correspondents highlights that those in Western and Northern European countries score higher in terms of sustainability and their effectiveness in providing touring opportunities for artists and companies, and supporting festivals and venues in diversifying and internationalising their programmes. In the Balkans and Eastern Partnership countries, support is mostly provided by foreign bodies and cultural diplomacy initiatives rather than by domestic instruments. Western and Southern Europe are also the macro-regions that take part in the highest number of Creative Europe projects, while Eastern Europe, Eastern Partnership and the Balkans are the least participating macro-regions. The digital tools available to support different aspects of cross-border presentation also shows an imbalanced picture, both for the promotion and distribution of works towards audiences as well as tools facilitating matchmaking and networking within the sector. More than half of these tools are to be found in Western European countries. These asymmetries lead to the current situation which is more advantageous for professionals in Western and Northern Europe, while the performing arts field in Eastern and Southern Europe have less access to sustainable support. At the same time, it must be acknowledged that there are also significant gaps between the countries within the same macro-regions, and country-based analysis of flows and schemes would have been deeper and it would provide a more complete and nuanced picture of actual disparities.

Understanding the drivers and dynamics of cross-border presentation

In light of the specific characteristics of the performing arts market, these imbalances come to no surprise. As early as the 1960s, economists William Baumol and William Bowen argued that a structural feature of the performing arts market is the so-called ‘cost disease’. Practicing the performing arts professionally is relatively expensive, not only because of the production costs but

also because each show or performance is highly labour intensive. The cross-border nature of a performance only adds to this predicament because of the additional costs of travelling, accommodation and subsistence. This cost disease phenomenon explains why the performing arts market is very much shaped by government intervention. Therefore, the unequal distribution of support schemes for cross-border touring, presentation and digital tools across different countries leads to the imbalances in cross-border flows of the performing arts presentation.

The quantitative research focused on visible products, specific support schemes and digital tools needs to be contextualised. It is clear that inequalities related to cross-border presentation do not happen in a vacuum - they relate to other systemic issues within broader performing arts ecosystems. For instance, the lack of support for cross-border touring and presentation often coincides with other gaps, such as an absence of support for promotion, network development and showcasing, which are crucial for getting access to cross-border presentation opportunities. This scarcity of support also interrelates with a broader lack of infrastructure, equipment and space, as well as with a shortage of opportunities for education, capacity building and professional development, and the creation of the performing arts works that will go on tour. These gaps aggravate one another, and issues related to touring and presentation only manifest themselves at the end of the value chain. There is no ‘level playing field’ in the Creative Europe group of countries, since the access to education, professional development and production differs greatly from country to country. This unequal access is not only related to geographic parameters - including the gaps between urban and rural areas - or differences between public institutions and independent players. It also concerns privileges and inequalities related to race, ethnic and socio-economic background, physical ability, gender and gender identity, sexual orientation and migrant status. These complex intersections between such parameters have a strong impact on access to artistic education, professional development, infrastructure and financial resources for artistic development, creation and – ultimately – presentation opportunities.

In general, environmental considerations are gaining ground in the discussion about the modes of production, distribution and presentation in the performing arts. While in the past ten to fifteen years the environmental issue was mainly raised by innovators, its urgency has certainly increased and triggered deep reflections within the broader performing arts field. This has resulted in the development of various tools aimed to make practices in the performing arts more sustainable. A mental shift is taking place. Many artists and organisations are increasingly integrating ecological considerations in their strategic frameworks - they have experimented with innovative practices. However, many find it difficult to translate these often ad hoc and scattered initiatives into a more sustainable practice, in an accelerated system under increasing pressure. It is also clear that

the possibility to engage with more environmentally sustainable practices is interlinked in a complex way, with many of the privileges and inequalities mentioned above. Ecological considerations are prioritised more in the regions with better access to touring opportunities. In other regions, breaking out of isolation is considered more urgent.

The Covid-19 pandemic has had a tremendous impact on the cross-border distribution of performing arts works. From spring 2020 to winter 2022, venues and festivals were partially or completely closed in most of the 41 countries in a series of lockdowns and re-openings. In general, cross-border traffic has generally been very much restricted, and multiple studies have revealed the destructive effects on the broader ecosystem of cultural and creative sectors, including the performing arts. Insights shared via the Mapping's survey, workshops and interviews stress that the inequalities described above have only been deepened by Covid-19. Those who were already in a more vulnerable position have been impacted the most - with less access to government support and compensation measures, or specific relaunch budgets. When cross-border touring and presentation came to a standstill, with more pressure being put on the most vulnerable players, the hiatus also proved to be an accelerator of experiments with new approaches towards the (cross-border) presentation of performing arts. Evidently, the interest in digital tools and the digitisation of all kinds of processes in the performing arts has greatly increased. 80% of the presenters and 71% of the producers responding to the Perform Europe survey indicated that the pandemic led to an increase of their use of digital tools for cross-border touring and presentation.

How we want cross-border presentation to be: 5 sustainability values

Based on the research steps carried out in the context of the Perform Europe Mapping, what should the ideal situation look like, with regards to cross-border touring and presentation? As explained in the introductory chapter, "sustainability" is defined in the framework of Perform Europe as a quality of practices which can be sustained or continued over a longer period. It is also understood holistically, in terms of its economic, artistic, social, human and ecological dimensions.

— Economic sustainability

For many performing artists and companies, cross-border touring and distribution is part of their business models. When the internal market for their discipline is small, it is necessary to explore foreign markets in order to maintain a sustainable artistic practice and organisation. Sustainable cross-border touring and presentation require resources and investments, not only for funding the presentation of works, but also for the development of one's network. On a more systemic level, survey respondents indicated that sustainable cross-border distribution

should not be based on competition but on collaboration: it should be part of an economic system based on fairness, solidarity and sharing of resources.

— Artistic sustainability

Artistic values should be the centre stage of cross-border collaborations, which means that artistic logics should be fundamental in all processes. This will allow for the performing arts to deploy its role as a force and catalyst in a broader societal context, starting from its own unique logics, dynamics and added value. Time and space for artistic development, production and dissemination are key to seize this artistic potential for society. This includes the possibility of longer stays, as well as enough time and space for the work to develop before it goes on tour. Cross-border presentation of performing arts works is crucial for artistic development, because a rich and diverse offer allows impulses for the development of local performing arts ecosystems.

— Social sustainability

Cross-border presentation of performing arts is about sharing artistic works with audiences. Social sustainability first and foremostly about ensuring that diverse audiences have access to the arts. The right contextualisation of a performance leads to communities having co-ownership of spaces where cross-border perspectives are shared within the local context. The development of sustainable social connections needs time and space, and it benefits from a slow pace for arts practices. These are a necessary precondition of a more inclusive approach towards artists and audiences that allows producers and presenters to engage with the specificity of the contexts in which they bring new artistic works.

— Human sustainability

Cross-border presentation should be beneficial for personal development and wellbeing of all artists and cultural workers involved. This includes artistic recognition and personal and professional growth. Time and space are necessary conditions to care for the wellbeing and ensure an appropriate work-life balance of everyone involved in touring experiences. Resources are needed to develop the right skills, competences, capacities and knowledge for cross-border presentation. Fairness should be a guiding ethical principle in the performing arts ecosystem - this includes not only fair remuneration but also transparency, trust, security and equity.

— Ecological sustainability

Environmental sustainability of cross-border touring and presentation starts with an increased ecological awareness by performing arts professionals. This awareness should result in adopting greener practices

of production, touring and presentation and reduced or compensated carbon emissions of the entire value chain. However, we can aim higher: the performing arts can play a meaningful role in the transition of our societies towards a more just and sustainable future which goes further than just reducing the environmental impact of their activity. The performing arts can be a laboratory stimulating our collective imagination of a more sustainable reality which is not only environmentally sustainable, but is also fair and just in a global context.

Gaps and complex system dynamics

This image of a more sustainable future practice for cross-border touring and presentation came out of the co-creative trajectory in the first stages of Perform Europe. This trajectory also clearly outlined the complexities of making this desired image into a reality. In a complex system – such as the European performing arts ecosystem – these five values lead towards a difficult balancing exercise. Investing in one value framework - for instance a deeper engagement with local communities through slower tours - might lead to additional pressures on other value frameworks, such as longer stays abroad hindering work-life balance situations of artists and arts workers. Slow production and presentation require additional economic resources. In such a wide and diverse geographic context – with different performing arts ecosystems nested in a diversity of political and social realities – this balancing exercise can play out in distinct ways. Even the very concept of “sustainability” and “inclusiveness” can be interpreted differently depending on a political, economic, social, historical and cultural context. Developing a Creative Europe wide operational framework meant we had to deal with this diversity of contexts and histories.

Confronting the current situation and the desired state lead to the identification of several gaps, presented in the tables below.

First, we identified the general gaps played out on an individual and organisational level in the performing arts ecosystem and in the broader societal context:

- Lack of time and space for slower practices
- Lack of knowledge and awareness about inclusivity and sustainability
- Lack of access to the necessary resources to innovate practices in a more sustainable and inclusive way
- Lack of skills and capacities to develop sustainable cross-border practices
- Lack of connection and collaboration, to develop diversified cross-border networks and development opportunities
- Lack of fairness, equality and equity

- Lack of recognition of the societal value of the performing arts

Second, we identified a number of policy and funding gaps:

- Asymmetries and differences between macro-regions, with regard to funding opportunities in different fields, not only for cross-border presentation
- Lack of flexibility and long term perspectives in funding schemes
- Lack of incentives for stimulating more sustainable practices, both on an individual/organisational basis and a systemic level

Future perspectives

Mapping and contextualising cross-border flows, and confronting these insights with a co-creative vision of a more sustainable practice, the Perform Europe Mapping can function as a backdrop for the further development of the Perform Europe process and policy making on an EU level. In the short term, the Mapping infused and shaped the Testing and Development phases of Perform Europe, which included the creation of the Digital Platform, drafting and opening the first and second calls for application, selection and matchmaking and eventually testing innovative models of touring and presentation of performing arts. In the longer term, these insights will serve as a basis for further research on inclusivity and sustainability of the European performing arts distribution system, and importantly contributed to the policy recommendations elaborated by Perform Europe for the EU and national policy-makers.

Introduction

1 ABOUT PERFORM EUROPE

Perform Europe is an EU-funded project which aims to rethink cross-border performing arts presentation in a more inclusive, sustainable and balanced way, in the 40 countries of Creative Europe and the UK. The project is an 18-month journey which includes a research phase, launching a digital platform, testing a support scheme, and designing policy recommendations.

Between December 2020 and June 2021, Perform Europe explored and mapped the context in which performing art works have been presented across borders in the past few years. The research team identified and analysed the current issues and disparities in the European system of performing arts touring and presentation, and indicated some solutions for bringing change. This report summarises the key findings of this research.

Based on the learning points of our research phase, we released the Perform Europe Digital Platform. This virtual space has been Perform Europe's tool to help applicants network and showcase their artistic works and presenting opportunities such as festivals and venues which strive to develop and practice more sustainable and inclusive touring and distribution models. 19 ambitious partnerships, composed of 88 organisations (companies, collectives, individual producers and artists, festivals, and venues) representing all performing arts disciplines, were selected by the Perform Europe Jury. Running until the end of June 2022, the Perform Europe Live Programme offered more than 250 presentations of over 45 artistic works in 27 Creative Europe countries and the UK.

Throughout our Perform Europe journey, we have been developing policy recommendations to advise the European Institutions and Member States on how to integrate a support scheme for performing arts distribution in the Creative Europe programme 2021-2027. These recommendations also offer policy insights to other policy levels and fields and to the sector at large.

2 ABOUT THE MAPPING

Objectives

To develop a truly innovative Distribution scheme and Digital Platform, we started with a comprehensive overview and analysis of the current support instruments, digital tools and bottom-up practices related to the cross-border performing arts distribution in Europe. This was done in the Mapping phase. To what extent are current practices sustainable, balanced and inclusive, and how do the digital and physical aspects of touring interrelate? In what ways do current support schemes promote, embrace or hinder sustainability? How should the key features of Perform Europe be shaped and undertaken, so that it plays a role in existing schemes, accelerating our desired transition towards more fair, green and inclusive distribution practices? These questions were answered through a mix of qualitative and quantitative methods and a focus on a) the mapping and analysis of existing schemes and digital tools, b) the mapping of current practices related to cross-border touring and c) the analysis of the gaps between these two.

The aim was to provide Perform Europe with a set of requirements and recommendations in regards to the design of both the Distribution scheme and the Digital Platform. The Mapping largely contributed to the definition of the criteria and conditions for the Jury's selection of producers and presenters in the first application round and distribution of proposals in the second round. Also, the results of the Mapping phase have been translated into a set of technical specifications for the Digital Platform. Finally, the Mapping has nourished the implementation of the policy recommendations' task.

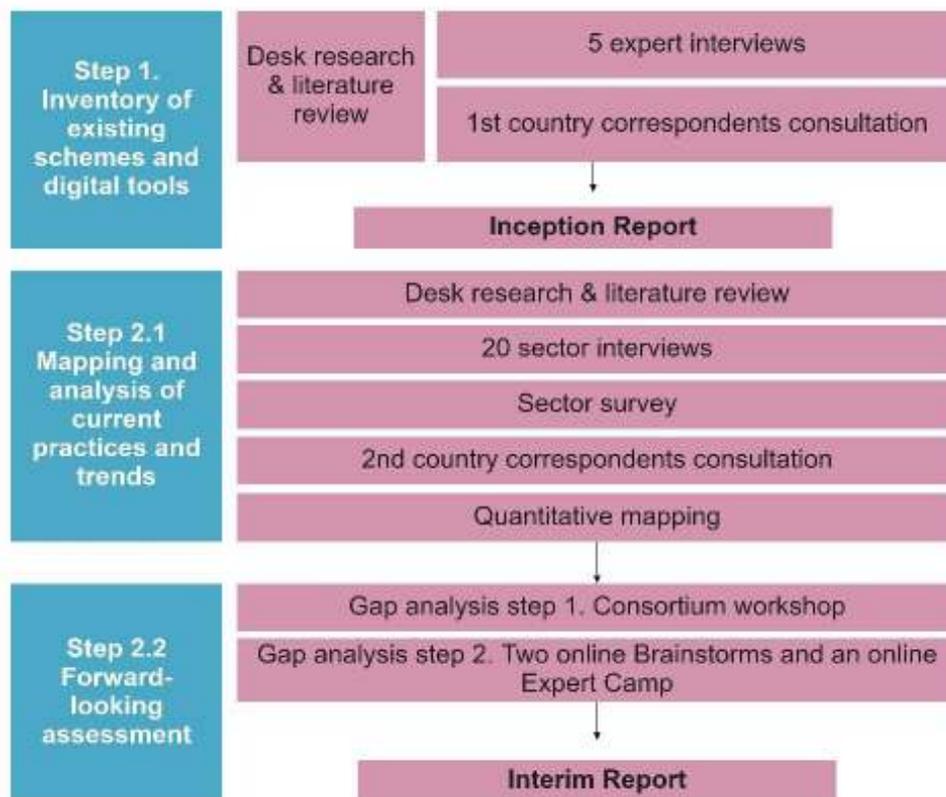


Figure 1: Methodology of the Mapping phase (Dec 2020 - May 2021)
Source: IDEA Consult

Methodology

The research phase was undertaken in three steps:

- Mapping of the existing support schemes and digital tools for the cross-border distribution of performing arts works in 41 countries (step 1)
- Mapping and analysis of current practices and trends in performing arts distribution (step 2.1)
- Forward-looking assessment of the existing schemes in relation to the current practices and identification of conditions and criteria for the development of a new cross-border Distribution scheme (step 2.2).

The conceptual framework

Perform Europe is driven by the belief that cross-border distribution of performing arts works is highly valuable for contemporary societies. However, in the sector there is a strong need to reinvent the current distribution practices, in order to adapt this contribution to society to the changing realities and to make it future proof. Therefore, Perform Europe aims at setting a coherent vision on how to generate sustainable models for cross-border touring and presentation, based on the values of **sustainability, inclusivity and balance**, and embed them in the performing arts' operational practices. Such a profound change can only be the result of a collective and inclusive bottom-up exercise where the performing

arts sector in all its diversity joins forces for collective learning, co-creation of projects and the development of partnerships. Digitalisation is seen as a means of enhancing this process, not as a purpose in itself. In these unprecedented times, 'future proof' means considering different possible future scenarios with regards to the challenges for cross-border distribution of performing arts in our post-Covid societies.

— Sustainability

The Perform Europe Consortium uses the working definition of "sustainable practice" introduced in the context of "Rewiring the Network (for the Twenties)"², a collective research and development project undertaken by IETM in collaboration with IDEA Consult. The definition is as follows: "a 'sustainable practice' is one which can be sustained over a longer period of time." In this context, we believe that sustainability is not about 'growth' in purely quantitative terms. It is about creating the right conditions which allow for a long term perspective and which help the sector and society to 'grow' in a social sense (more meaningful exchanges with audiences),

² https://www.ietm.org/en/system/files/publications/rewiring_the_network_-_final_report_0.pdf

a human sense (respecting the wellbeing of workers involved in the project), the artistic sense (creating the right conditions for artistic development), an economic sense (sustainable business models and fair remuneration) and environmental sense (respecting the ecological boundaries).

— **Inclusivity**

Perform Europe defines inclusivity, proactively reaching out to art professionals and audiences from different social backgrounds, race, gender and class in order to ensure their equal access to distribution opportunities and a diverse artistic offer. Special care is taken towards target groups which often do not take part in nor benefit from cross-border distribution of the performing arts. This means embracing wider and more diverse groups of society, including minorities (race, gender, class, physical abilities, sexuality) and citizens living in rural and peripheral areas – both as participants in the Distribution scheme and audiences. Perform Europe has gone an extra mile promoting the scheme to professionals living in rural and peripheral areas in countries less represented in the international performing arts system, based on existing studies and the Mapping phase's outcomes. It has targeted organisations working with artists with disabilities, professionals from migrant and refugee background and feminist and LGBTIQ+ organisations. The Consortium network partners activated their membership in the underrepresented countries, and approached dozens of organisations working on specific inclusion topics in different countries. The scheme aims to stimulate sound strategies of engaging local audiences and shaping shared cross-border narratives around a touring performance.

— **Balance**

Perform Europe's Distribution scheme wants to make a difference by achieving more balance in the cross-border distribution of performing arts works. Therefore it was important to map current imbalances and work towards an equal representation of various players at all levels of Perform Europe: the artistic disciplines, the size of organisations, the balance between emerging and established artists, gender balance, geographic location and the balance between urban and rural touring destinations. The jury focussed on balance for the selection criteria in both application rounds, the representation within expert groups, stakeholders for the mapping interviews and participation in Perform Europe's workshops.

Focus areas	Current state	Desired state	Gaps and imbalances	How to bridge the gaps?
Sustainability in economic, ecological, social, human, artistic terms	<p>Flows</p> <ul style="list-style-type: none"> - Which flows can we observe in a cross-border presentation of performing arts works? <p>Schemes and digital tools</p> <ul style="list-style-type: none"> - What are the existing schemes and digital tools available in the cross-border distribution of performing arts works? <p>Drivers</p> <ul style="list-style-type: none"> - What are the “drivers” behind these flows? - What motivates and moves producers and presenters? - What are the logics of the system? 	<p>Aspects of sustainability</p> <ul style="list-style-type: none"> - What does our desired future distribution system in the performing arts sector look like? - What does sustainability, inclusion and balance mean? In economic, artistic, ecological, social, human and artistic terms? 	<p>Gaps with regards to practices in the sector</p> <ul style="list-style-type: none"> - What is missing in the sector? <p>Evaluation of schemes and tools</p> <ul style="list-style-type: none"> - To what extent are current schemes and digital tools adequate and effective enough to reach the desired state given the main post-covid challenges? 	<ul style="list-style-type: none"> - How can these “gaps” be dealt with and bridged in the context of the Perform Europe process and in future Creative Europe funding calls supporting touring and distribution? What initiatives should the call provoke? - How can these “gaps” be dealt with and bridged in the broader policy contexts?

Table 1: Gap analysis template

Source: IDEA Consult

The analytical framework

The analytical framework for the entire mapping is that of a gap analysis. With a focus on “sustainability” in economic, ecological, social, human and artistic terms, this gap analysis focuses on a confrontation of the current state of affairs, with the desired state leading to the identification of a number of “gaps” which should be tackled on a short term as part of the Perform Europe process. It should also be tackled on a longer term through future initiatives in the context of Creative Europe 2021-2027.

To analyse the material in an accumulated way, the 41 Creative Europe countries were grouped in six macro-regions:

- 1. Balkans:** Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia
- 2. Eastern Europe:** Bulgaria, Poland, Czech Republic, Romania, Hungary, Slovakia, Slovenia, Croatia
- 3. Eastern Partnership:** Armenia, Georgia, Moldova, Ukraine, + Tunisia
- 4. Northern Europe:** Denmark, Estonia, Finland, Iceland, Latvia, Lithuania, Norway, Sweden
- 5. Southern Europe:** Cyprus, Malta, Italy, Greece, Spain, Portugal
- 6. Western Europe:** Austria, Belgium, Luxembourg, Germany, France, the Netherlands, UK, Ireland.

Results of the Mapping and Analysis

1 THE CURRENT STATE

In this section, we map and analyse the current situation regarding cross-border touring and distribution of performing arts works in Europe, as follows:

1. First, we map the flows with regards to the cross-border 'traffic' of performing arts works by combining the results of the large-scale survey with a quantitative mapping exercise based on Facebook Events data.
2. Then we present a mapping and analysis of the way cross-border distribution of performing arts works is supported via an exhaustive list and analysis of support schemes on a national, macro-regional and European level, and of the existing digital tools that support distribution of the performing arts.
3. We conclude by analysing the main drivers having an impact on the cross-border flows, by synthesising results from the survey, the desk research, interviews, and the two large brainstorming sessions.

Analysis of current trends in physical and digital distribution of performing arts works

Currently, there are no robust and exhaustive data sets that allow for a solid quantitative analysis of the flows concerning cross-border touring and presentation in the 40 Creative Europe countries and the UK³. To map the current flows of cross-border presentation, some of the **results of the large-scale sectoral survey were combined with a quantitative mapping** based on web-scraping, using the data generated by the Facebook Events feature. In the first step, we used the survey responses from 1.100 artists, producers and companies that provided information on where they are based and where their work has been presented. In the second step, we compiled a data set of 6.000 performing arts Facebook Events created by 253 producers and presenters responding to the survey, via a web scraping experiment.

³ In 2011, mapping the mobility of performing arts works collecting existing data was the subject of Travelogue, a research project which was part of SPACE, a platform dedicated to support the performing arts circulation in Europe. Within this mobility project (2008-2011) Travelogue undertook experimental research in linking and sharing data on international performing arts touring that were collected by institutions (governments, intermediaries,) all over Europe. Rather than mapping mobility itself, the result of this experiment was a better understanding of issues with regards to data collection: a) the lack of data in countries and regions where policy support for cross-border distribution of performing was lacking, and b) lack of minimal interoperability of existing datasets. See: <https://arts-mobility.info/>

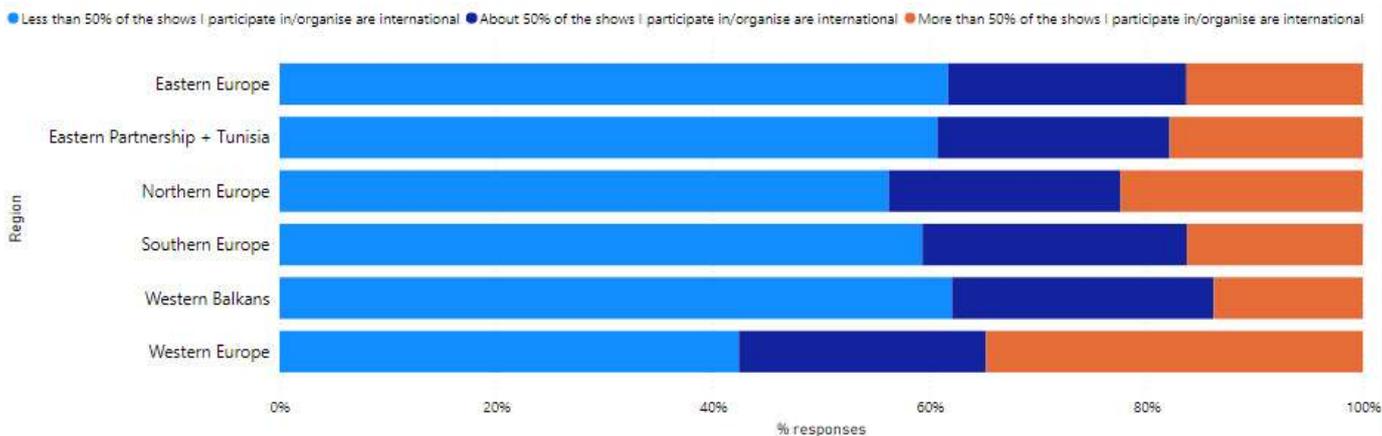


Figure 2: Percentage of cross-border shows in the total number of shows which respondents (only creators/producers/artists managers) have participated in or have organised

Source: IDEA Consult, based on data from the Perform Europe survey

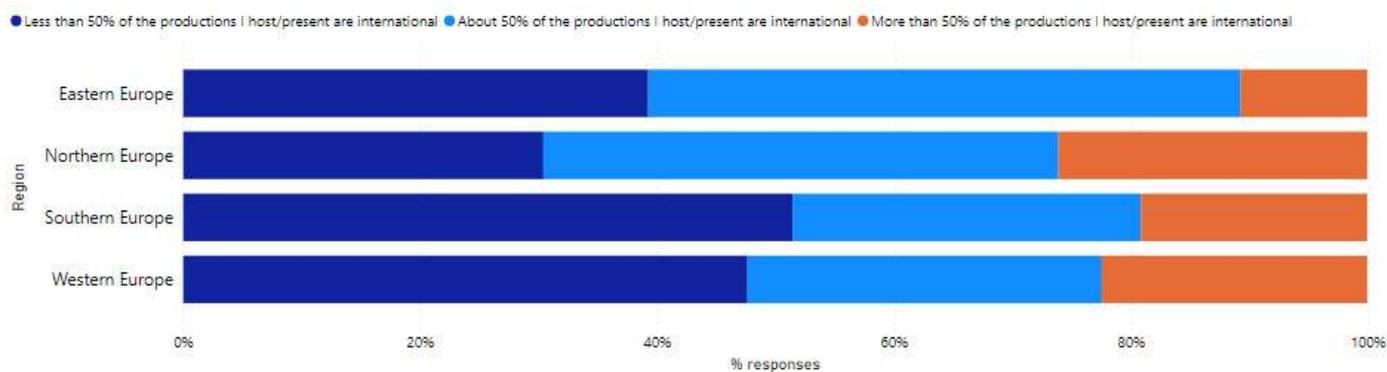


Figure 3: Percentage of cross-border shows organised by presenters and programmers who answered the survey

Source: IDEA Consult, based on data from the Perform Europe survey

I MAPPING THE FLOWS – SURVEY RESPONSES

The survey asked several questions with regards to respondents' personal profile and experience on an international level. From this, we learn that **most of the respondents in the survey have international experience and an international profile**. In response to a survey question, 94 % of the venues and festivals have already presented works from foreign artists. 82% of the artists, companies and producers surveyed have already toured at least once outside their own country. This means that we worked with **data provided by respondents who are active on an international level**.

Second, the respondents were asked questions about the **“weight” of cross-border activities in their performing arts presentation activities**:

- Figure 2 shows that a West European **producer** is the most active in cross-border activities (35%), closely followed by producer respondents from Northern Europe. The profile of respondents located in Southern Europe, the Balkans, Eastern Partnerships

and Tunisia is similar: most artists and producers that responded to the survey have international experience - however, the number of producers with a large proportion of international activities is lower than in Western Europe. A comparison between disciplines (not included in the graph) reveals that more than half of the shows from about 30% of dance, circus and street art creators are international. On the other hand, in the theatrical field, a smaller percentage (21%) of producers said that more than half of their shows are international.

- Figure 3 shows data on **presenters and programmers**: West and North European presenters have the highest proportion of cross-border work in their programmes (respectively 22% and 26%), compared to Southern and Eastern Europe (respectively 20% and 11%). Similar insights are drawn from the comparison between artistic disciplines: circus and street art is still the discipline with the largest number of presenters for which more than 50% of the performances hosted are cross-border (27%), followed by dance (23%) and theatre (18%).

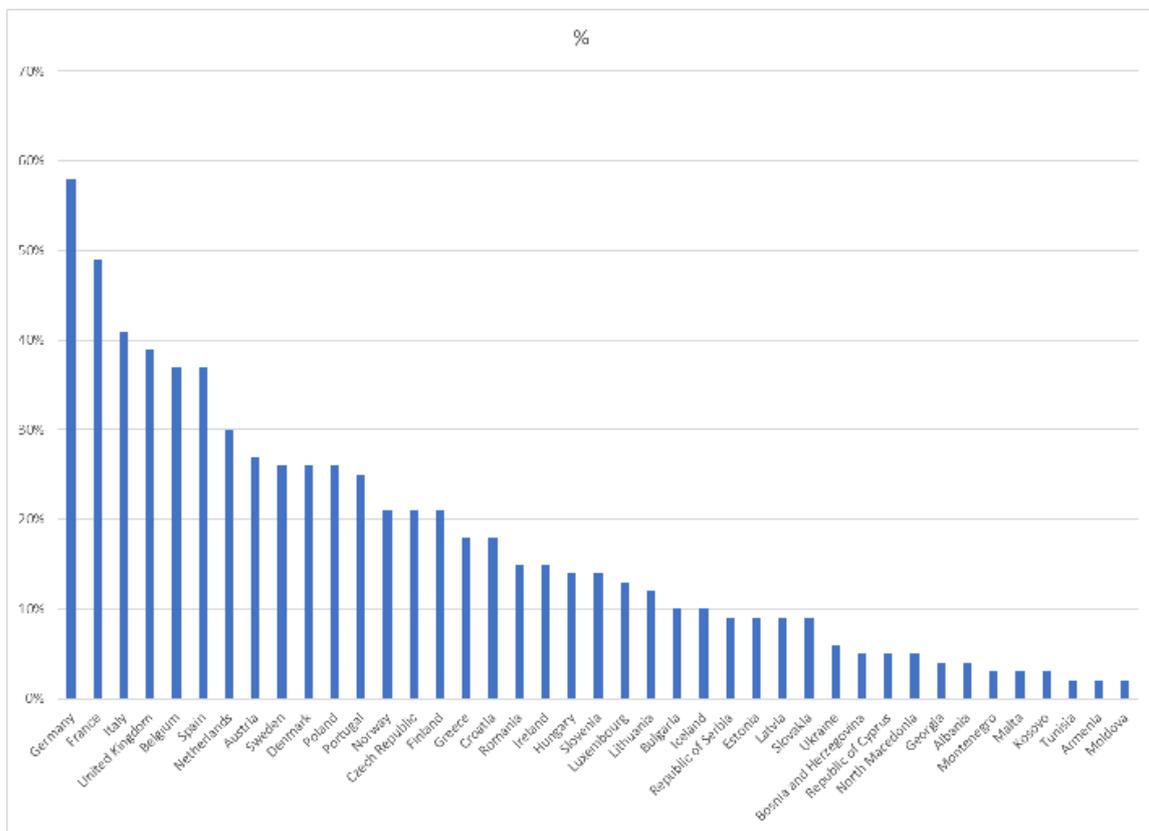


Figure 4: List of countries where artists, companies and producers have shown their work at least once (N: 1.102)
Source: IDEA Consult, based on data from the Perform Europe survey

To further map current geographical flows with regards to cross-border presentation of performing arts works, we worked with **data** provided by **producers, artists and companies**⁴. Figure 4 shows where their work has been presented at least once. More than a third of the responding producers indicated that their work has been shown in Germany (58%), France (49%), Italy (41%), UK (39%), Belgium (37%) or Spain (30%). Less than 5% of our producing respondents indicate that their work has been shown in Georgia, Albania, Montenegro, Malta, Kosovo, Tunisia, Armenia, or Moldova.

In Figure 5, the same data is visualised on a Sankey diagram, a type of flow diagram in which the width of the lines is proportional to the flow rate. For several reasons – both with regards to the readability of the image and the granularity of the analysis allowed by the data set – we grouped the 41 countries in the 6 macro-regions mentioned above. The left side of the graph represents the macro-regions where the producing respondents are based. On the right are the macro-regions where the work of the producing respondents has been shown at least once. The width of the flow between the left and right sides of the diagram shows the number of survey respondents who indicated that they presented their work at least once in another country within this macro-region.

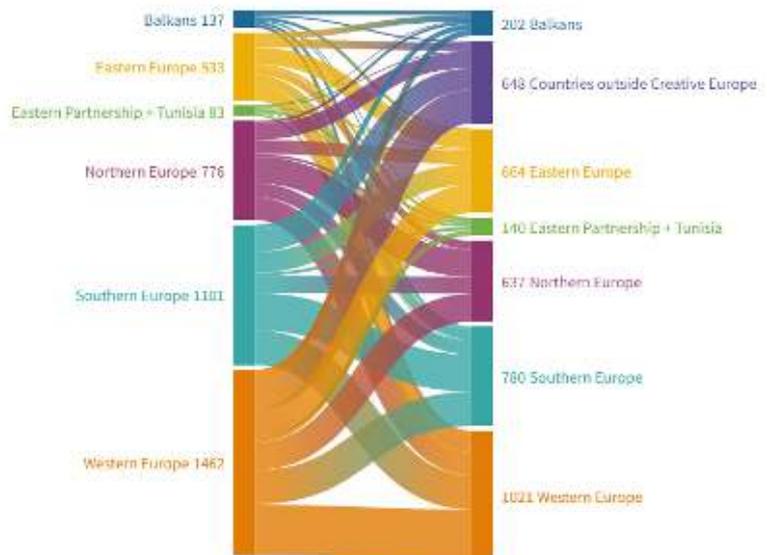


Figure 5: Countries where the work of artists, companies and producers has been presented at least once (N: 1.102)
Source: IDEA Consult, based on data from the Perform Europe survey

The left side of the graph represents the macro-regions of the producer respondents. A higher number of respondents from Western and Southern European countries contributed to the survey, and their responses indicate that they are the most internationally connected compared to other macro-regions. The Balkans and the Eastern Partnership and Tunisia are the macro-regions where a lower number of international connections have

⁴ Total number of responses considered = 1.102.

been reported. The same imbalance is reproduced on the right side of the graph, showing the macro-regions where the respondents indicate that their work has been presented. The Balkans and the Eastern Partnership and Tunisia are also the macro-regions in which the lowest number of respondents have presented their work. At the same time, there is a good diversity in regards to the geographical base of artists across all macro-regions. In all macro-regions on the right side (“destination” side), there are flows arriving from each part of the left side (“based in” side); in other words, in every macro-region it is possible to see performing arts works by artists from all other macro-regions.

While the survey data serves as a rich source of information, it does not provide data on the “volume” of the cross-border traffic of performing arts works. “At least once” can either be a one-off event or a recurring practice. This is where the mapping experiment using Facebook data comes in.

Facebook experiment

In the survey, all respondents (producers and presenters) were asked whether they use Facebook to announce their events, and whether this data could be used for a quantitative mapping experiment. A web scraping experiment resulted in a data set consisting of 253 respondents and approximately 6.000 events, for which we obtained data on both the destination of the

event and the origin of the producers⁵. More than 80% took place between 2017 and 2021. Table 2 shows the percentage of these observed events performed by artists in their own countries within borders, cross-border events remaining within the borders of that specific macro-region, events crossing the borders of macro-regions and the total amount of Facebook events, shown in that specific macro-region⁶.

Line 1 can be interpreted as audiences in the Balkans are prompted via Facebook about 168 events. 106 of these are produced by producers from the country in which the audience is based. 60 of these events are organised by producers from the same macro-region in which the audience is based; 2 events are organised

⁵ Those who responded positively provided the research team with the necessary details to access the information they published online. A list of Facebook profiles was obtained (or websites referring to a Facebook URL). Whereas 88% of respondents with core activity “production” indicated that they use Facebook, the research team could only retrieve Facebook accounts for 376 respondents (less than 20% of respondents). 270 respondents, out of 376 of whom we could retrieve a Facebook account, seemed to use the Facebook Events module. From these 270 respondents (13% of the total number of respondents), we were able to obtain 20.000+ events. # When filtering the Facebook data to events with a defined country, we ended up with the data set. These data are all about announced events, some of which might have been then cancelled because of Covid-19 or other reasons.

⁶ One can remark that the sum of the three first columns is in some cases higher than the total number of events observed for this macro-region. This is due to the fact that some of the observed events are coproductions, linked to producers with different locations of origin. This is also the reason why, in the second part of the table, the sum of the percentages in some macro-regions is higher than 100%.

	Amount of observed Facebook events in this macro-region, by artists performing in their own country (“within-borders” events)	Amount of observed Facebook events in this macro-region, by artists performing in another country, in the same macro-region (cross-border events from the same macro-region)	Amount of observed Facebook events in this macro-region, by artists from another macro-region (cross-border events from another macro-region)	Total amount of Facebook events observed in this macro-region
Balkans	106	60	2	168
Eastern Europe	1073	158	26	1250
Eastern Partnership + Tunisia	372	-	2	374
Northern Europe	896	58	46	933
Southern Europe	1135	80	28	1231
Western Europe	1789	88	132	1941

	Percentage of “within-borders” events (of all observed Facebook events in this macro-region)	Percentage of “cross-border” events from the same macro-region (of all observed Facebook events in this macro-region)	Percentage of “cross-borders” events from another macro-region (of all observed Facebook events in this macro-region)
Balkans	63%	36%	1%
Eastern Europe	86%	13%	2%
Eastern Partnership + Tunisia	99%	-	1%
Northern Europe	96%	6%	5%
Southern Europe	92%	6%	2%
Western Europe	92%	5%	7%

Table 2: Amount and percentage of Facebook events which are shown in the same country where the artists are based (“within borders”), cross-border events (by foreign producers based within or outside of the same macro-region), or cross-border events by producers based in another macro-region.

by producers from another macro-region in which the audience is based. In general, audiences mostly see productions by producers from the same country. There is a good chance of seeing productions from producers in the same macro-region in the Balkans and Eastern Europe, but it is relatively hard to see productions from a different macro-region. In the other areas, the difference between being able to see productions from within the same macro-region versus from other macro-regions is less pronounced, so mobility across macro-regions is more common. It is most likely to also see productions from outside the macro-region in Western Europe.

One of the conclusions drawn from Table 2 is that most of the events within this database are by artists and companies performing in their own country. These are called ‘within-borders’ events. By excluding them, Figure 6 presents a more detailed look at specifically cross-border events, where there is a difference between the country where producers are based and the country where their work is shown. This is the main focus of Perform Europe.

Once more, in Table 2 and on Figure 6, we see differences in volume among the macro-regions, with less data about the Balkans, Eastern Partnership and Tunisia in particular. For the latter macro-region, the dataset contains hardly any cross-border events. For the Balkans there is a significant cross-border flow, but it stays mostly within the macro-region where we can also see an asymmetrical relationship. In the Balkans, works by artists from all other macro-regions were presented, but the Facebook event analysis did not result in any evidence of Balkan producers travelling to the West, the North or the South of Europe. For the other

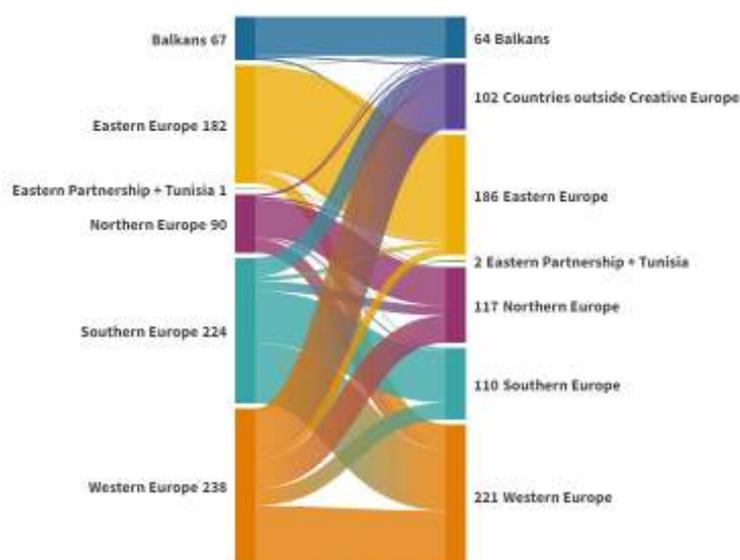


Figure 6: Based on the number of cross-border Facebook Events, the flow from the macro-regions where producers are based (left) to the macro-regions where events took place (right).

Source: IDEA Consult, based on Facebook experiment

macro-regions the image is different. We see artists presenting their work in all other macro-regions. Most cross-border traffic originating in Eastern and Northern Europe remains within their macro-regions. Originating in Western and Southern Europe, cross-border mobility outside their own macro-region is more voluminous than the cross-border mobility within their own macro-region. Traffic outside of the non-Creative Europe countries comes largely from Western European producers.

Mapping the flows – an evaluation and key takeaways

Overall, the Perform Europe survey had a good response rate with approximately 2.000 answers, of which 1.400 were fully completed. Most respondents have at least some international experiences. The Facebook Events web scraping resulted in a larger dataset of more than 20.000 events. Only 6.000 of these events showed full location information, from 253 producers and presenters from whose Facebook Events had been scraped, using the schema.org json data embedded in the pages⁷.

On one hand, this has been a successful experiment – as far as we know, this experiment is the first of its kind to map cross-border mobility in the performing arts making use of social media data. Over the years there have been many discussions and debates concerning the asymmetries in cross-border mobility flows. The data collected by the Perform Europe research team visualises these asymmetries in a novel way. On the other hand, it is obvious that this data is incomplete and that many details are lacking, such as sectoral insights or regarding the distribution of works not only within and between macro-regions, but also between countries and within countries. Even though it is initially promising, the data gathered on cross-border presentation flows remains in an experimental stage.

In regards to the imbalances of the geographic location of respondents, where most are based in Western and Southern European countries, it seems to at least partially represent systemic issues. These are the main insights and learnings in relation to cross-border presentation of performing arts works, which are corroborated by the insights collected through the Perform Europe interviews and brainstorming:

1. In every macro-region it is possible to see artistic work by producers based in each of the other macro-regions.
2. Most traffic happens within countries and within macro-regions.
3. Western Europe is exporting the most to all other regions and especially outside of the Creative Europe area, closely followed by Southern Europe.
4. Northern Europe and Eastern Europe are strongly focused on their own macro-region; Northern Europe is also exporting considerably to Western Europe.
5. Balkans, Eastern Partnership and Tunisia are the least active in cross-border presentations. The Balkans are considerably less present than other macro-regions in the cross-border flows of import and export.

⁷ JSON Schema is a vocabulary that allows you to annotate and validate JSON documents: <https://json-schema.org/>.

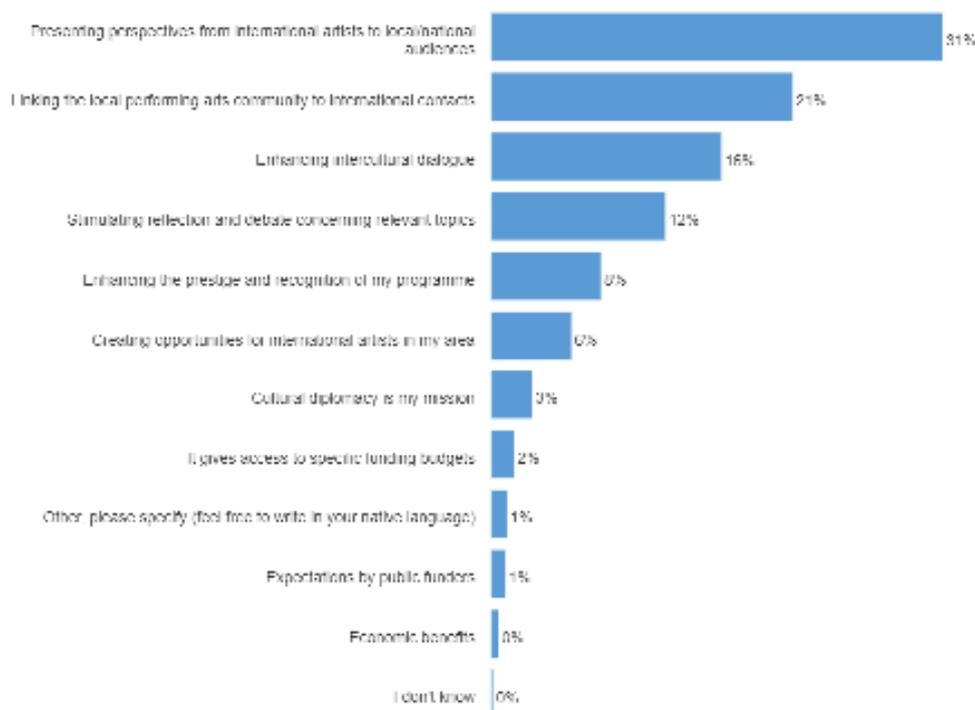


Figure 7: Main reasons that motivate presenters to programme performing arts works from other countries (N: 247)
Source: IDEA Consult, based on data from the Perform Europe survey

II ANALYSIS OF THE MAIN MOTIVATIONS AND OBSTACLES

This next section deals with the motivations, benefits and obstacles related to cross-border distribution of performing arts works, through the eyes of presenters and producers that responded to the Perform Europe survey.

Motivations and obstacles – presenters’ perspectives

The **key stimulus for presenters to show international work** is the wish to bring the perspective of international artists to local and national audiences (31%).

Interestingly, for presenters, cross-border presentation is also an important strategy to develop the local artistic scene. Presenting international work is important to uplift and connect the local scene (21%), much more than the other way around (developing opportunities for international artists in the area).

As shown in Figure 8, when presenters were asked from three possible options what drives their selections of artistic works to show, artistic considerations are key. Choices are made first and foremost based on the artistic quality of the work. Presenters also select work striving to diversify the local artistic context – what is

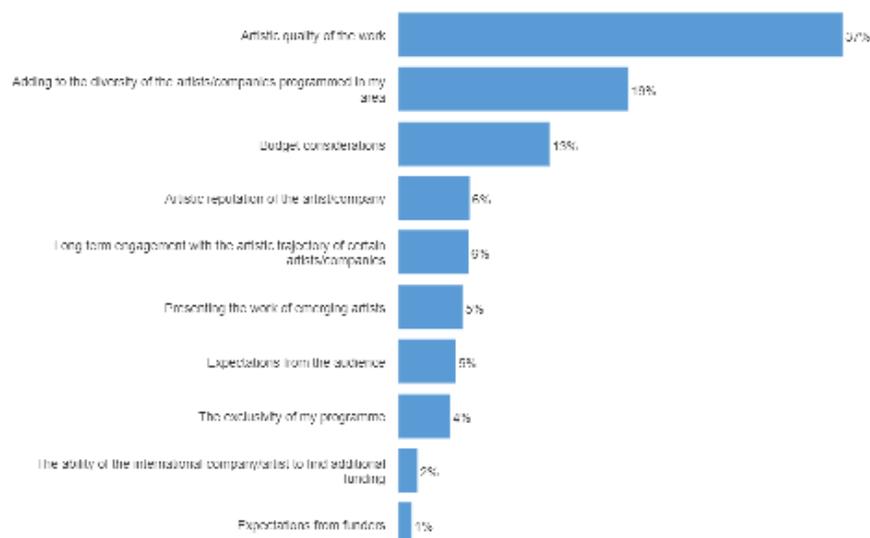


Figure 8: Leading considerations of presenters when selecting or inviting productions from other countries (N: 76)
Source: IDEA Consult, based on data from the Perform Europe survey

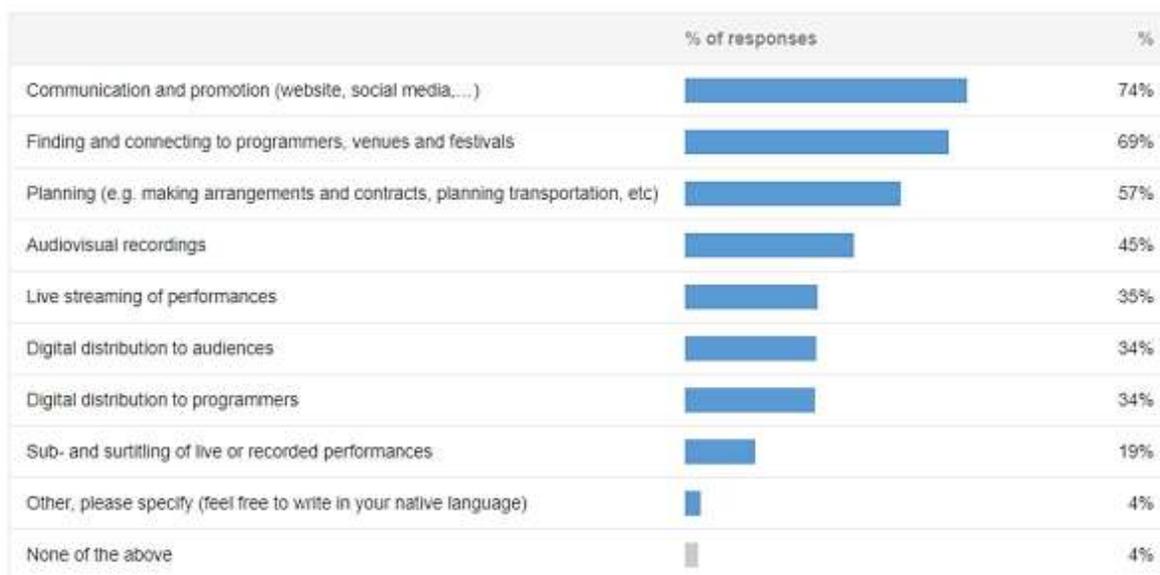


Figure 9: Main obstacles that presenters are confronted with when they programme performing arts works from other countries (N: 244)
Source: IDEA Consult, based on data from the Perform Europe survey

already on show in the rest of their context or area. While external motivations didn't come up in Figure 7, budget considerations are a strong factor when it comes to obstacles.

Figure 9 gives an image of the main obstacle that presenters face when hosting foreign productions: limited financial resources (almost 87%) for covering the costs of presenting their work. A lack of resources for scouting and prospection (31%) also comes as a significant barrier. Obviously the lack of resources does not only concern the costs related to the presentation of cross-border work, but are also related to acquiring knowledge and connections.

Motivations and obstacles – producers' perspectives

Furthermore, we looked at the **motivations and obstacles from producers' perspective** based on the survey data.

Presenting their work to new audiences appears not to be the main motivation for producers. Producers are rather presenting their work abroad to strengthen their position within the performing arts ecosystem: first by developing their networks and second by gaining visibility and recognition. This might mean that the main expectation of producers is that presenting their work would lead to more visibility among programmers and therefore more opportunities for further touring. Comparing Figure 10 to Figure 7, generating income and visibility seems to be more important for companies and producers than it is for presenters.

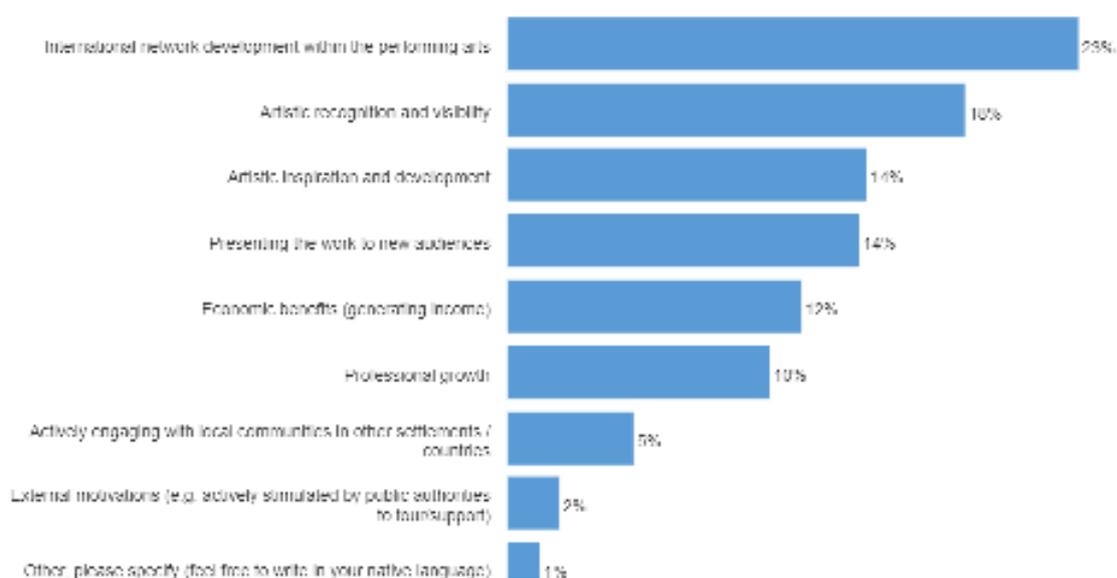


Figure 10: Main purposes for which producers present their work outside their country (N: 1.048)
Source: IDEA Consult, based on data from the Perform Europe survey

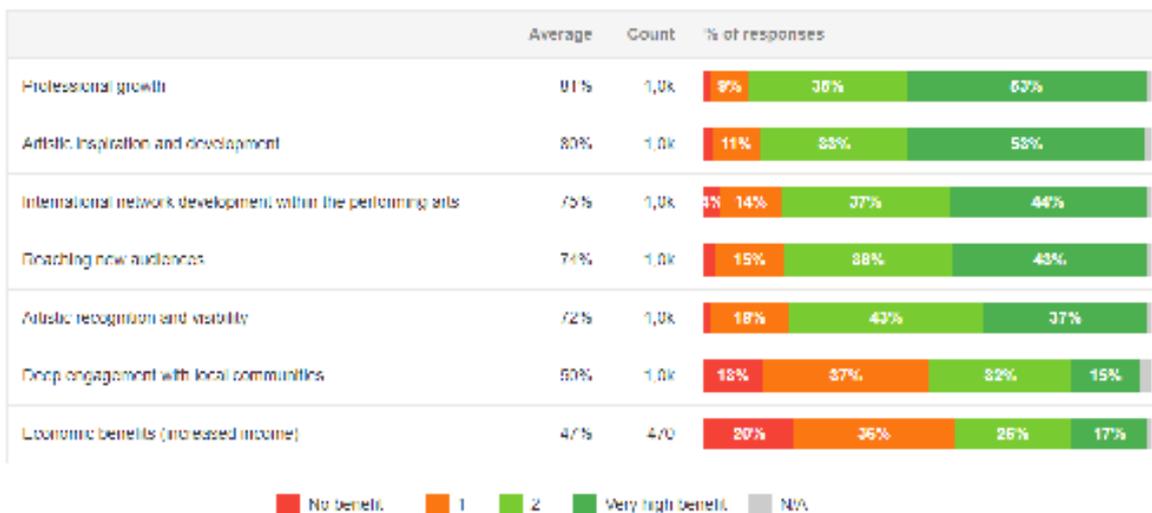


Figure 11: Main benefits that producers experienced when they presented abroad the work they create, produce or represent (N: 1.015)
 Source: IDEA Consult, based on data from the Perform Europe survey

Next we look at the main benefits that producers gain when presenting their work abroad. Survey participants were asked to score a list of potential benefits, from 0 (zero benefit) to 3 (very high benefit).

Overall, professional growth and artistic inspiration and development were marked as the most experienced benefits. A large share of producer respondents also achieved developing their international networks and reaching new audiences. However, a deeper engagement with local communities is one of the least experienced benefits. Ultimately, economic benefits received the lowest scores. Most of the respondents have never or rarely gained such benefits when touring across borders.

From the perspective of producers, economic issues are the main obstacle. Strikingly, this is not only about the difficulty to find funding, but also about limited personal financial investment. The lack of long term perspective of funding programmes is also an issue. Furthermore, it is complicated to organise a “compact” tour (a tour with limited time intervals between the different dates); producers lack time to invest in such tours and to develop networks.

Respondents were also asked to rank the top three **obstacles** that they are confronted with when organising or supporting cross-border presentations.

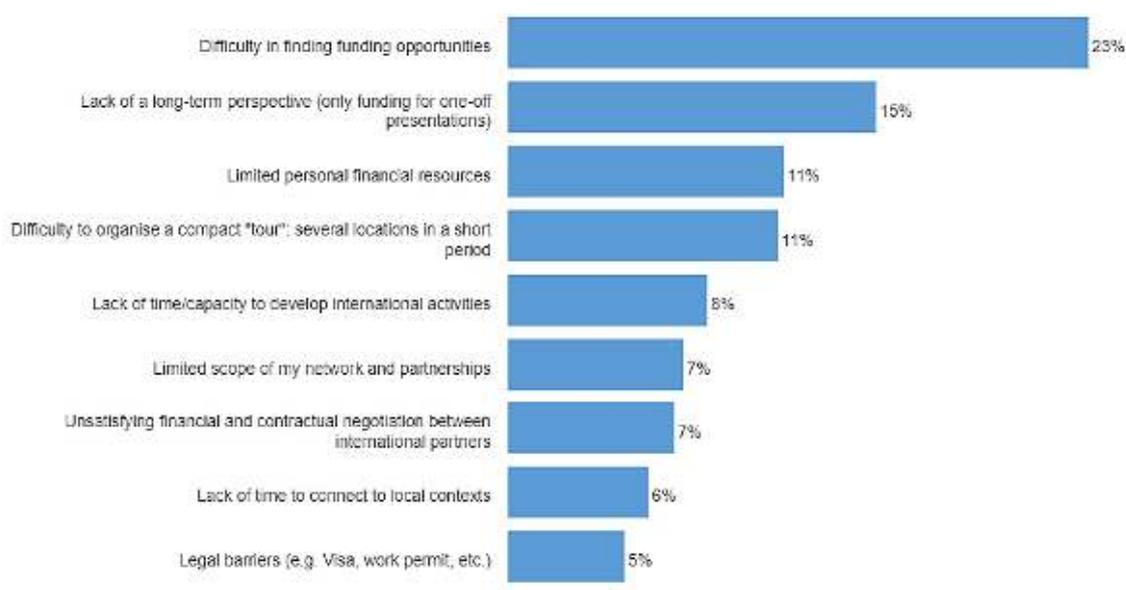


Figure 12: Main obstacles that producers are confronted with when organising or supporting cross-border touring (N: 992)
 Source: IDEA Consult, based on data from the Perform Europe survey

	Presenters	Producers
Motivations	<ol style="list-style-type: none"> 1. To present international artists to local/national audiences and diversify the offer 2. To develop the local performing arts ecosystem 3. To enhance intercultural dialogue and stimulate reflection and debate 4. Economic considerations are not the motivation, but play a role in the selection process 	<ol style="list-style-type: none"> 1. International network development within the performing arts 2. Artistic recognition and visibility 3. Artistic development and inspiration 4. Generating income is also a reason. Not to make money. Producers tour internationally mainly to strengthen their position on the market.
Obstacles and constraints	<ol style="list-style-type: none"> 1. For 87% limited financial resources is the main obstacle 2. The lack of resources for scouting and prospection (31%) 	<ol style="list-style-type: none"> 1. Finding financial resources: funding and the lack of personal resources 2. The lack of long term perspective in funding is an issue 3. The lack of time to invest in internationalisation and to develop networks

Table 3: Overview of motivations and obstacles by producers and presenters

Motivations and obstacles – key takeaways

The following table provides a summary of the main insights, when looking at the motivations for and obstacles when engaging in the cross-border distribution of performing arts works.

III MAPPING AND ANALYSIS OF NATIONAL AND REGIONAL FUNDING SCHEMES

This section contains a mapping and analysis of the relevance and sustainability of support schemes and digital tools for cross-border touring and presentation that currently exist in the 41 countries that are the main focus of this research.

Diverse degrees and type of support

The schemes included in the analysis:

- are defined as funded and non-funded programmes that support the cross-border distribution of performing arts works. “Programmes” encompass one-off calls, structural or envelope funding, residencies (only if they explicitly aim at supporting cross-border distribution), co-financing grants, established platforms and periodical showcases.
- were currently running or had been suspended at the time the research was conducted in the first half of 2021. Schemes that had been suspended because of the spread of the pandemic could also be included. Schemes that were permanently stopped, were not included in the inventory.

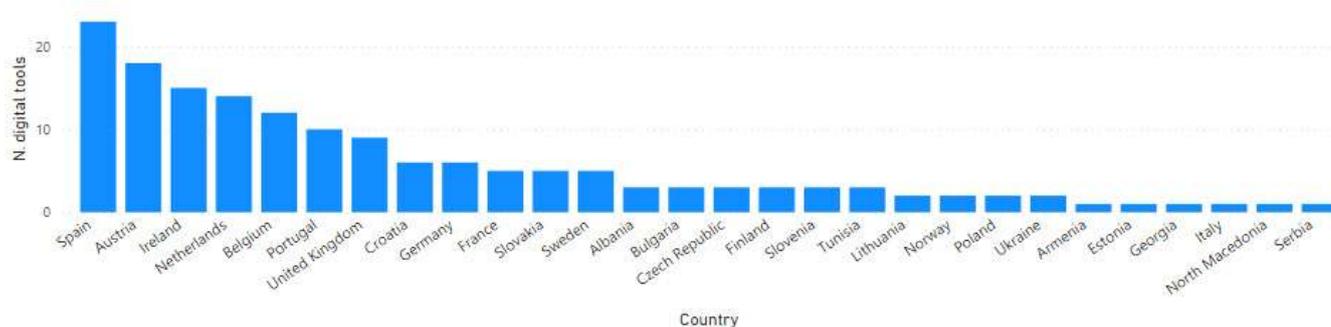


Figure 13: Number of support schemes by country

Source: IDEA Consult

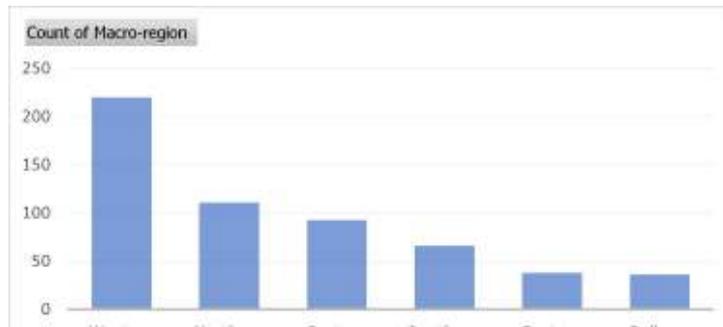


Figure 14: Number of support schemes by macro-region
Source: IDEA Consult

A total number of **565 schemes** was collected by the country correspondents across the 6 macro-regions. The figures below show the number of collected support schemes by country and macro-region.

Figure 13 shows the number of support schemes per country. Most of the support schemes were identified in France, Belgium, Spain and Sweden. The analysis reveals that **more than 50% of these funding schemes are concentrated in Western and Northern Europe**. From a purely quantitative point of view, the data is certainly remarkable, but it must be contextualised:

- Western, Northern and Eastern Europe are the macro-regions that include the largest number of countries (8) compared to Southern Europe (6), the Balkans (6) and Eastern Partnership and Tunisia (5). In terms of average number of funding instruments per country we have 27.5 schemes in Western Europe, 17 in Eastern Europe, 14 in Northern Europe, 11 in Southern Europe and 7 both in Eastern Partnership and Tunisia and in the Balkans. However, there are also significant differences at country level within the same macro-region.
- The micro and macro-regional contexts also matter. In countries such as Belgium, Spain and Germany, cultural competence is taken up on local and regional levels which could potentially lead to a higher number of funding instruments. As for the macro-regional level, we must also take into account that some countries, in particular Nordic countries, also work a lot with supranational bodies and instruments.

- The effectiveness of national cultural policies greatly differ across the 41 countries, as explained in detail in the next sections.

Regarding the **type of support, the type of provider(s), the beneficiaries and the disciplines covered**, the text and figures below provide an overview of the schemes in general and by macro-region.

- **Type of support:** 70% of the schemes provide financial support, while the remaining schemes provide either non-financial support (14%) or a combination of both (15%). Figure 15 presents the proportion of the various types of support by macro-region. There are no major differences between macro-regions; the only point to emphasise is that the number of schemes providing both financial and non-financial support in Western Europe is higher than in other macro-regions.

When it comes to identifying what types of activities the schemes support, we observe that overall most of the schemes support simultaneously different types of activities such as: one or more cross-border presentations (398 schemes), international co-production (296), networking (255) and - to a lesser extent - "go & see" exploration (185), marketing and promotion (140) and collective international promotion (99).

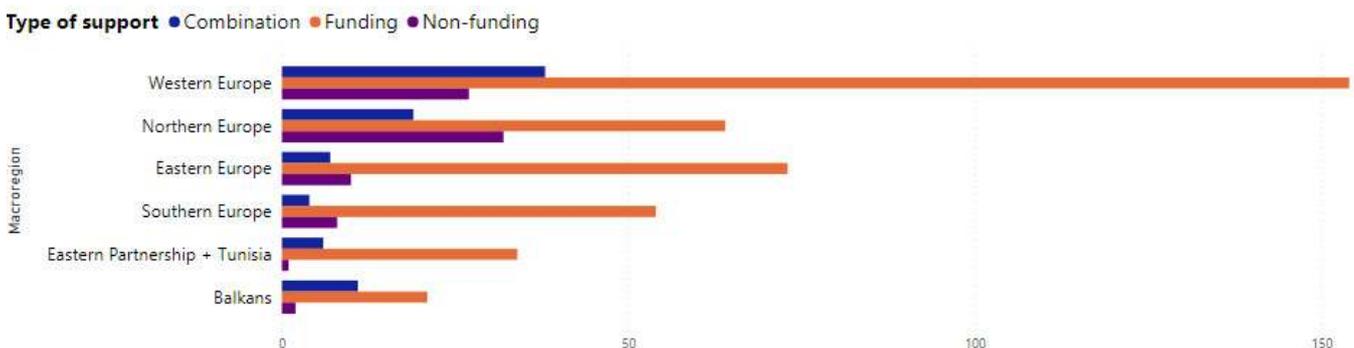


Figure 15: Type of support by macro-region (in absolute numbers)
Source: IDEA Consult

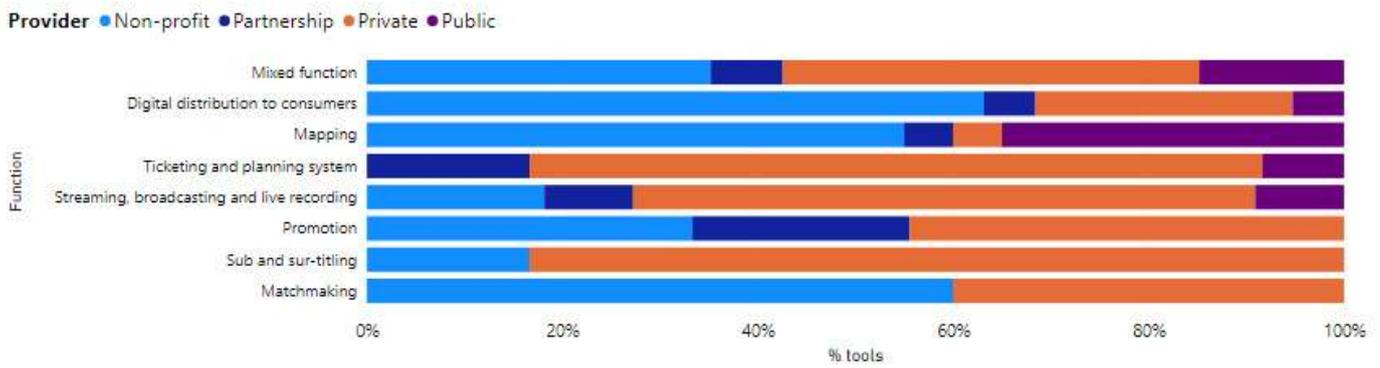


Figure 16: Type of scheme provider by macro-region
Source: IDEA Consult

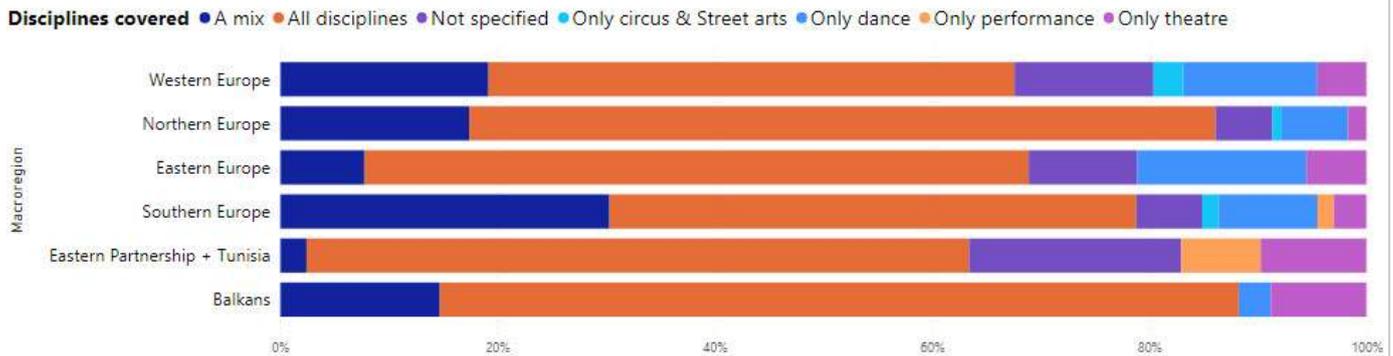


Figure 17: Disciplines covered by the schemes (by macro-region)
Source: IDEA Consult

- **Type of provider:** more than half of the schemes are provided by a public entity in the form of a national, regional or local government (64%), while 20% of the schemes are provided by non-profit entities – associations, cultural institutions or networks. Only 8% are provided respectively by a partnership (between public, non-profit or private entities) and 7% by a private entity. Figure 16 shows some differences at macro-regional level: although the percentage of schemes provided by public entities is high in all macro-regions, this is higher in Eastern Europe (more than 80%), Southern Europe (around 75%) and Western Europe (around 65%). Eastern Partnership and Tunisia is the macro-region where most of the schemes are provided by non-profit entities (27%), a partnership (19,5%) or a private entity (10%).
- **Artistic disciplines covered:** overall, most of the schemes address all performing arts disciplines (57%) or combine several disciplines (17%). Only a few schemes are aimed to support professionals only in specific sub-disciplines (10% only dance, 5% only theatre). Figure 17 shows that most support schemes cover all or a mix of disciplines in all the macro-regions. The first four macro-regions are those with the highest percentage of schemes aimed at specific disciplines, mainly dance and theatre. Circus and street arts are the artistic disciplines with the smallest number of dedicated support schemes.

- **Beneficiaries:** concerning the professional categories that can apply and benefit from the support provided, half of the schemes are aimed at producers (51,5%), including both companies and individual artists, and 38% of them address both producers and presenters. Only a negligible part is exclusively addressed to presenters. As observed in Figure 18, in all of the macro-regions most schemes support the production side, closely followed by both producers and presenters at the same time. Moreover, the number of schemes specifically supporting presenters is remarkably low in all the regions. Particularly in the Balkans there are no schemes targeting just presenters, even though 62% of the schemes target both producers and presenters. Overall, one can conclude that support schemes prioritise export and cross-border networking over import.

Based on the quantitative data provided above and on analysis of the type of support provided and scope of the schemes, we identified **three levels of support** across the 40 Creative Europe countries and the UK:

- **Strong support:** this category encompasses all countries that not only have a large number of schemes supporting cross-border touring and distribution, but that also provide schemes which are balanced in terms of the type of support, beneficiaries addressed and disciplines covered. It should be highlighted that the strong support provided to

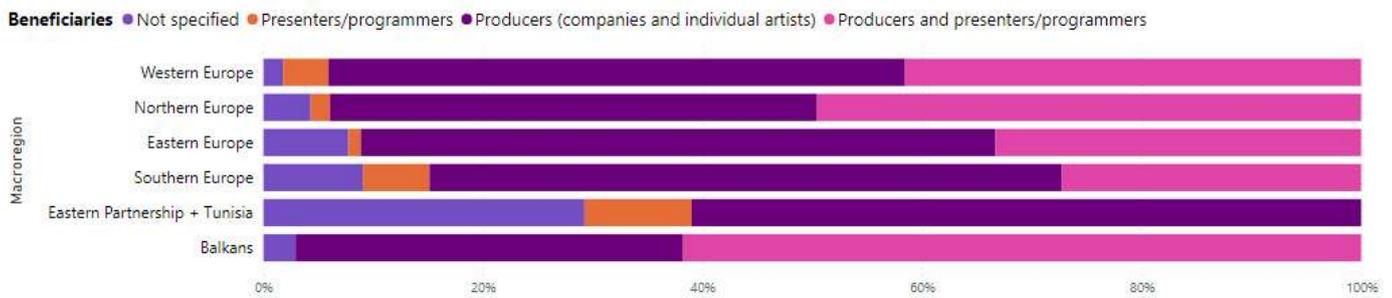


Figure 18: Beneficiaries targeted by the support schemes, by macro-region

Source: IDEA Consult

cross-border distribution of performing arts works in these countries coincides with strong national cultural policies and infrastructure, as further explained in the next section. The countries under the “strong support” category are Austria, Belgium, France, Germany, Ireland, Luxembourg, Netherlands, Spain, Sweden and the UK⁸.

It should be emphasised that in addition to these countries, the Nordic Region also falls into the ‘strong support’ category.

- **Medium support:** the case of the “medium support” countries vary greatly. There are countries where, despite the existence of national cultural policies and cultural infrastructure, cross-border distribution of the performing arts is not considered as a funding priority. Therefore it is not well supported; there are other countries where, despite the lack of sufficient public support, foreign or supra-national entities fill this gap. The countries within the “medium support” category are Albania, Bulgaria, Croatia, Czech Republic, Denmark, Finland, Hungary, Latvia, Lithuania, Italy, Norway, Poland, Portugal and Tunisia.
- **Low support:** this category includes all the countries that have little to no schemes supporting cross-border distribution of performing arts works. In most cases, the level of support for the performing arts sector (and in general to the cultural and creative sectors) in these countries is rather limited. There are various drivers that lie behind the low number or the absence of schemes in these countries, namely the inadequacy (or absence) of national cultural policies and the non-recognition of certain performing arts disciplines, or the independent scene. The countries under this category are Armenia, Bosnia and Herzegovina, Cyprus, Estonia, Georgia, Greece, Iceland, Kosovo, Malta, North Macedonia, Moldova, Romania, Serbia, Slovenia, Slovakia, Ukraine.

⁸ The countries that are part of the official body of the Nordic Council are: Denmark, Finland, Iceland, Norway, Sweden, the Faroe Islands, Greenland and Åland.

Characteristics and sustainability of the support systems

During the second round of consultation, the country correspondents deepened the previously collected data and enriched the analysis with qualitative information. This helped to evaluate the adequacy of the schemes in relation to their national contexts. As anticipated above, the conceptual framework within which the evaluation was carried on is the same that informs the overall Mapping: the five values of sustainability. Bearing this framework in mind, we have identified **15 key analysis dimensions**. The fifteen dimensions are:

- **Transparency:** the schemes follow transparent and clear procedures in general (formal call, formal budget, transparent selection procedure based on award criteria)
- **Accessibility:** the schemes are easily accessible to all the performing arts professionals (both established and emerging artists, producers, presenters)
- **Foreign provider:** the schemes are in most cases provided by foreign funding entities or cultural institutes, rather than domestic international cultural policy initiatives
- **Macro-regional provider:** the schemes are in most cases provided by initiatives of the region where the country is based (e.g., Balkans, Nordic countries, Benelux, etc.)
- **Intra-regional connection:** the schemes provide exchange opportunities with neighbouring countries, within the same region
- **Inter-regional connection:** the schemes provide exchange opportunities with non-neighbouring countries
- **Digital and hybrid solutions:** the schemes provide opportunities to explore digital and hybrid solutions and strategies for touring and presentation
- **Outgoing touring:** the schemes create enough international touring opportunities for artists from one’s country

- **Incoming touring:** the schemes provide enough opportunities to present a wide range of international performing arts works in one's country
- **Discipline balance:** the schemes provide balanced support to all performing arts disciplines
- **Public/independent scene balance:** the schemes provide adequate support for both public and independent initiatives
- **Connection with rural areas:** the schemes provide support to connect international artists to audiences in rural areas
- **Support to emerging artists:** the schemes provide international touring support to emerging artists
- **Ecological solutions:** the schemes stimulate ecologically sustainable solutions for international touring and presentation
- **Connection with audiences:** the schemes provide enough opportunities to build relationships with audiences and audience development activities during the tour

Based on the quantitative and qualitative analysis of the inventories compiled, the correspondents evaluated the ability of the country schemes to cover the above key dimensions, which are related to the sustainability of support for cross-border touring and presentation. The research team identified three levels of sustainability across the 6 macro-regions:

Medium to strong sustainability

This category encompasses Western and Northern Europe. In these two macro-regions, solid systems of cultural policies have made it possible to develop a **strong support structure for the performing arts** over time, and therefore also for mobility, touring and distribution. In almost all the countries in these two macro-regions, the support schemes are not only numerous, but also well balanced in terms of type of activities supported, proportion of financial and non-financial support provided, artistic disciplines covered and beneficiaries targeted. Moreover, the schemes follow **clear and transparent procedures**, both at the application and the selection level.

Although the support system in general is quite strong and balanced, there are some sustainability dimensions which are not yet covered by the numerous schemes available in these two macro-regions, namely ecologically sustainable solutions, support to foster touring from and to rural areas and, and even to a lesser extent - support to explore digital and hybrid solutions. In most schemes there is no mention of guidelines to support ecological solutions, although some few exceptions are present (e.g., in Luxembourg and Sweden). We also observe a lack of programmes specifically supporting rural areas or encouraging touring from and to rural areas. When

it comes to supporting digital or hybrid solutions, even in countries with the largest number of schemes, such as France, this is not considered a priority strand and therefore it is not financially supported.

Contrary to other macro-regions, **foreign funding entities and institutes do not play the dominant role** in the support systems of Western and Northern Europe, as most schemes are provided by domestic cultural policy initiatives. It must be highlighted that among domestic providers, public entities and non-profit organisations funded by public entities play a crucial role when it comes to supporting touring and distribution, and the cultural sector in general. In the UK, for example, all the support schemes are provided by the UK-based public agencies. In other cases, national foundations have an important role and effectively complement the support provided by public entities. Kultura Nova Foundation in Croatia is a significant example. The Foundation plays a strong complementary role in the Croatian cultural funding system and is the second most important support provider in the country.

Regarding the **role of supra-national bodies**, such as macro-regional entities, while in Western Europe the support schemes are not provided by supra-national initiatives, Northern Europe presents a unique situation. The official Nordic Cooperation has a major role in shaping the cultural policy of the Nordic countries and in supporting touring and presentations within the macro-region and beyond, through grants and dedicated measures. The Nordisk Kulturfond, established in 1966 upon an agreement between the Nordic countries, greatly contributes to artistic and cultural development in the Nordic Region by promoting cooperation between Denmark, Finland, Iceland, Norway, Sweden (plus, the Faroe Islands, Greenland and Åland).

Low to medium sustainability

Southern and Eastern Europe fall into this category. Based on the analysis carried on by the correspondents and by the research team, the situation in these two macro-regions can be considered halfway between the low and medium level of sustainability.

Although in most countries there are schemes specifically addressing touring and distribution of performing arts works, **these are often one-off calls which are not inserted in a broader policy strategy**. In Italy for example, despite several programmes and actions, there is no strategic approach to international cultural mobility and no capacity building strategy for the sector. Therefore, the schemes act as 'single shots' without a long-lasting perspective. Similarly in Bulgaria there is a lack of long term policy strategy for cultural and creative sectors. In Romania, the performing arts sector was hit hard by the Covid-19 pandemic, but public authorities (both national and local) did not efficiently respond to the deep and systemic crisis. Momentarily, there is no clear strategic vision on the future, which affects the amount and type of support to the cultural sector in general and specifically to the performing arts.

Schemes supporting the performing arts sector are either non-existing or insufficient to respond to the situation. In this context, international mobility and distribution are not in focus. Moreover, the **condition of independent professionals and organisations** is quite critical as well: public institutions, mainly in theatre, receive most of the available funding, and only a little part is left for the independent scene. This is valid for all the countries within these two macro-regions: in Poland and Czech Republic, for example, the imbalanced support between the public organisations and the independent scene is one of the main discussion points, especially because representatives of the independent field are often either not eligible to apply or have low chances to win the calls/receive funding. Independent artists and presenters often resort to festivals to make their work known and find touring opportunities, as well as to invite foreign productions. In Bulgaria, for example, most of the exchange happens through the festival infrastructure. Festivals can attract bigger audiences and bring sponsorship from private companies as well as support from municipalities and state funding. Therefore, the major international performing arts presentation is achieved through festivals, not through the structurally funded venues with a regular programme.

Regarding **transparency**, the schemes follow clear and transparent procedures in most countries within these two macro-regions. However, correspondents from some of the countries, such as Hungary and Italy, pointed out a different situation. In Hungary, support schemes have no clear and detailed criteria for the selection process. The callouts are public, the application procedures are transparent, but the decision-making process is not. The reasons for selection or rejection of applications is usually not shared with applicants, unless they have informal contacts. In some cases, despite being open and public, some calls do not have a proper selection board or jury, and policy-makers decide autonomously which projects will be supported.

In regard to the geographical scope of the scheme providers, we can observe that, unlike in the Balkans and Eastern Partnership and Tunisia, **most of the funding programmes and schemes are provided by domestic bodies and organisations**, mainly Ministries of Culture, public institutes and foundations. This has not always been the case for Eastern Europe, where in many countries the cultural sector (including the performing arts) was previously supported by foreign entities. In Czech Republic, for example, support from foreign funding entities and cultural institutes was stopped or reduced after the Czech Republic joined the EU in 2004. Foreign funding entities (especially the British Council, Institut français and Goethe Institut) were also very powerful in Slovakia. However, most of them now either completely left the country or focussed on supporting professionals from disadvantaged groups or on education programmes, rather than cross-border cultural exchange.

Low sustainability

The Balkans and Eastern Partnership and Tunisia can

be considered as regions with the least sustainable situation in terms of the adequacy of the support schemes. In both macro-regions, one of the primary causes of unsustainability is the **lack of ‘tout court’ funding schemes specifically aimed at international touring and presentation**, which corresponds to the flows observed in the quantitative analysis presented above. What the support scheme analysis points out is that there are no specific calls or specific lots in the existing calls addressing cross-border touring, and subsequently no specific budget allocated. This creates a big gap, as applications for international touring are subject to an evaluation within the wide spectrum of different project proposals received and no special emphasis is given to specific proposals for cross-border touring or international collaboration. Often these proposals are rejected with justifications related to high budgets requested for travelling outside the country or hosting companies from abroad. Schemes supporting touring are rare and underfunded, barely covering basic expenses. Therefore, there is no room to address important, but often considered secondary, aspects such as audience development, connection with rural areas, ecological aspects, etc.

Concerning the available funding schemes, in most cases they provide **inadequate financial support for both emerging and established artists**, as in general budgets are too small to cover cross-border travels. In Kosovo, for example, the average funding per project is around €1000/1500. Another example comes from Moldova where the only available annual public scheme supporting the independent scene covers the whole cultural and creative sector, of which performing arts are only one small part. The 2020 total budget for the performing arts was € 47.000 and, with such a small budget, applicants prioritise production and national touring, rather than cross-border collaborations. Since the call was launched there has been no selected project aimed at cross-border touring. In general, the lack of schemes specifically supporting touring - combined with low budgets - result in an unsustainable situation which is further aggravated by the **unequal recognition of artistic disciplines**. In most countries within the two macro-regions, theatre is officially recognised as an artistic discipline and therefore mostly targeted by support schemes. On the contrary, circus and street arts are not yet considered “official disciplines”; this makes it difficult (or impossible) for artists within this sub-sector to apply for and/or get funding.

In terms of accessibility and transparency, **not all the schemes are easily accessible by all performing arts professionals; not all schemes follow clear and transparent rules either**. In Albania, for example, one issue that was raised is that some schemes, including public ones, lack official websites and are only promoted on Facebook pages. Another issue concerns emerging artists, as none of the calls specifically addresses them, thus making it difficult to compete with established artists or organisations. Regarding transparency of the selection procedures, in most countries within these

	% of responses	%
National (public or private) funding programme		78%
Local (public or private) funding programme		43%
Regional (public or private) funding programme		41%
Funding via international cultural diplomacy initiatives		39%
EU funding programme		34%
Other international (public or private) funding programmes		26%
Other, please specify (feel free to write in your native language)		3%

Figure 19: Type of specific funding programme(s) accessed by respondents

Source: IDEA Consult, based on data from the Perform Europe survey

two macro-regions it is not common to have schemes following clear and transparent rules. Both Kosovo and Tunisia strongly point out that the selection and award criteria are often biased and unclear, especially when the provider is a public body. In Serbia and Kosovo, political interference is one of the reasons behind non-transparency: in Kosovo, according to the country correspondent, arts and culture subventions are often (mis)used by governments to reward political party militants and supporters (so-called “shadow funding”), while in Serbia there are many schemes which are not open and not transparent at all, but are rather launched to reward pre-selected beneficiaries.

Moreover, in both macro-regions, funding schemes are in most cases **provided by foreign funding entities or supranational/macro-regional bodies**, rather than being domestic cultural policy initiatives. For example in Georgia, after the collapse of the Soviet Union, the

main donor for mobility programmes for Georgian citizens was Open Society Institute (so-called Soros Foundation). Since 2003, the Ministry of Culture tried to support mobility programmes more consistently, but such support was not institutionalised and not translated into specific grants. These initiatives mainly depended on personal decisions of individuals, such as ministers or deputy ministers. In Georgia, as in most countries in these macro-regions, the role of foreign institutes (e.g., Goethe Institute, British Council, KulturKontakt, French Institute) or Embassies in supporting mobility is still very important. This support generally comes with a specific scope related to the exchange with the country where these institutes are based.

	% of responses	%
Budget too limited to cover the costs		61%
Lack of long-term funding options		44%
Complex application procedures		41%
Too long decision-making process		31%
No reimbursement for certain essential costs		26%
Too high competition		18%
Untransparent procedures and decision-making process		16%

Figure 20: Main challenges faced by respondents regarding funding programmes

Source: IDEA Consult, based on data from the Perform Europe survey

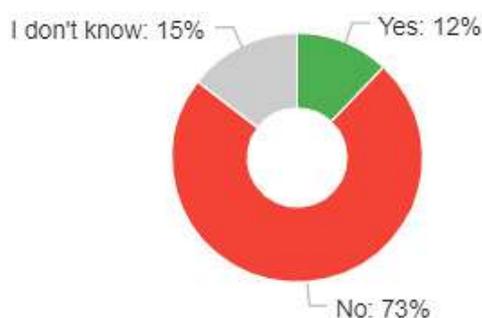


Figure 21: Answers to the question 'Without external support for touring, would you have been able to economically support the tour outside your country with your own resources?' (N:473)

Source: IDEA Consult, based on data from the Perform Europe survey

Although various levels of sustainability of the support systems across the 41 countries in focus can be observed, **72 inspiring practices** have been identified in all the 6 macro-regions. The practices have been identified both among the country inventories and thanks to further desk research. The Annexes present them in the form of fiches.

Experiences of survey respondents with funding programmes

To conclude the screening and analysis of the schemes supporting cross-border touring and presentation, you can find below information on the **experiences and obstacles faced by the survey respondents** when asked how they have mainly financed their cross-border tours or presentations, who was the provider of the funding programmes they have accessed and which were the main challenges faced.

The **main sources of financing** that producers and presenters accessed are structural funding, co-financed and funding programmes specifically dedicated to supporting cross-border touring and presentation.

One last important piece of information provided by the survey respondents relates to the **challenges** presented by funding programmes specifically aiming at supporting touring and presentation. Not surprisingly, as Figure 20 shows, more than half of the respondents confirm a trend previously identified: budgets are too limited to cover the costs of a cross-border tour or presentation (61%). The lack of a long term perspective (44%) and complex application procedures (41%) are the other two most relevant challenges for respondents.

Finally, a considerable percentage of respondents (73%) **said they would not have been able to finance the tour or presentation without external support**⁹. External funding is confirmed as a very important source of financing when it comes to international exchanges and showcases, touring and cross-border mobility in general.

IV MAPPING AND ANALYSIS OF EU-LEVEL FUNDING OPPORTUNITIES

Another step of our Mapping consisted of screening and analysing Creative Europe cooperation projects, platforms and networks focusing on the performing arts, with the aim to take stock of the support given by the Culture sub-programme of Creative Europe to performing arts professionals and specifically to cross-border touring and distribution.

The latest Monitoring report published by the European Commission lists the sectors that were considered as the main sectors covered by individual projects during 2019. Numbers show that, only in 2019¹⁰, performing arts was the sector with most projects funded (52%). However, a closer look reveals that most of all funded projects in the performing arts are music related and therefore are not in the Perform Europe scope. Among the disciplines covered by Perform Europe, theatre is certainly the most funded sub-sector, followed by dance and, lastly, street arts and circus arts. Beyond what is offered in the annual monitoring reports on Creative Europe, the following sections propose a more in-depth analysis of the Creative Europe cooperation projects, platforms and networks funded in the 2014-2020 period and relevant for the scope of Perform Europe.

Mapping and analysis of Creative Europe cooperation projects

To understand how cross-border touring and presentation are supported by the EU funding, we screened and analysed a number of projects funded by the Creative Europe programme, including both cooperation projects and specific schemes, such as i-Portunus, and the specific strand targeting the Western Balkans region.

⁹ Please note that the system only showed this question to those who previously replied that they had external funding.

¹⁰ Creative Europe monitoring report 2019. Published: 2020-09-02 https://www.euneighbours.eu/sites/default/files/publications/2020-09/KK0220378ENN.en_.pdf. Please note that this is the most updated report published by the European Commission and providing official figures on the Creative Europe programme.

Cooperation projects

Cooperation projects are transnational activities between organisations from different Creative Europe countries.

The sub-programme is divided into two strands:

- Small-scale projects involving a minimum of three partners from three eligible countries.
- Large-scale projects involving a minimum of six partners from six eligible countries.

In terms of objectives, cooperation projects need to address at least one of Creative Europe's priorities:

- Promoting cross-border mobility of artists and culture professionals and to stimulate an intercultural dialogue and exchange.
- Strengthening audience engagement and development in order to bring people and communities in enjoying and experiencing arts and culture, which will lead to a more inclusive and accessible culture.
- Fostering capacity building, so that cultural operators can develop their skills and internationalise their career.

- Enhancing international dialogue promoting mutual understanding and respect for other cultures, thereby contributing to the integration of migrants and refugees.

Within the timeframe of 2014-2020, the total number of cooperation projects funded by the Culture sub-programme was **646**. The following criteria has been used to select projects that are in line with the scope of Perform Europe:

- First criterion: the projects are centred around one or more of the five artistic disciplines in the scope of Perform Europe: theatre, dance, circus, street art and performance. Music and opera were not taken into consideration.

When applying this first criterion, the first screening shows that the number of projects with a focus on the performing arts is **109**, thus representing 17% out of all the projects funded by the Culture sub-programme. The artistic discipline that received most funding within the analysed sample is theatre (74%), followed by dance (53%), street art (32%), and lastly circus (around 12%).

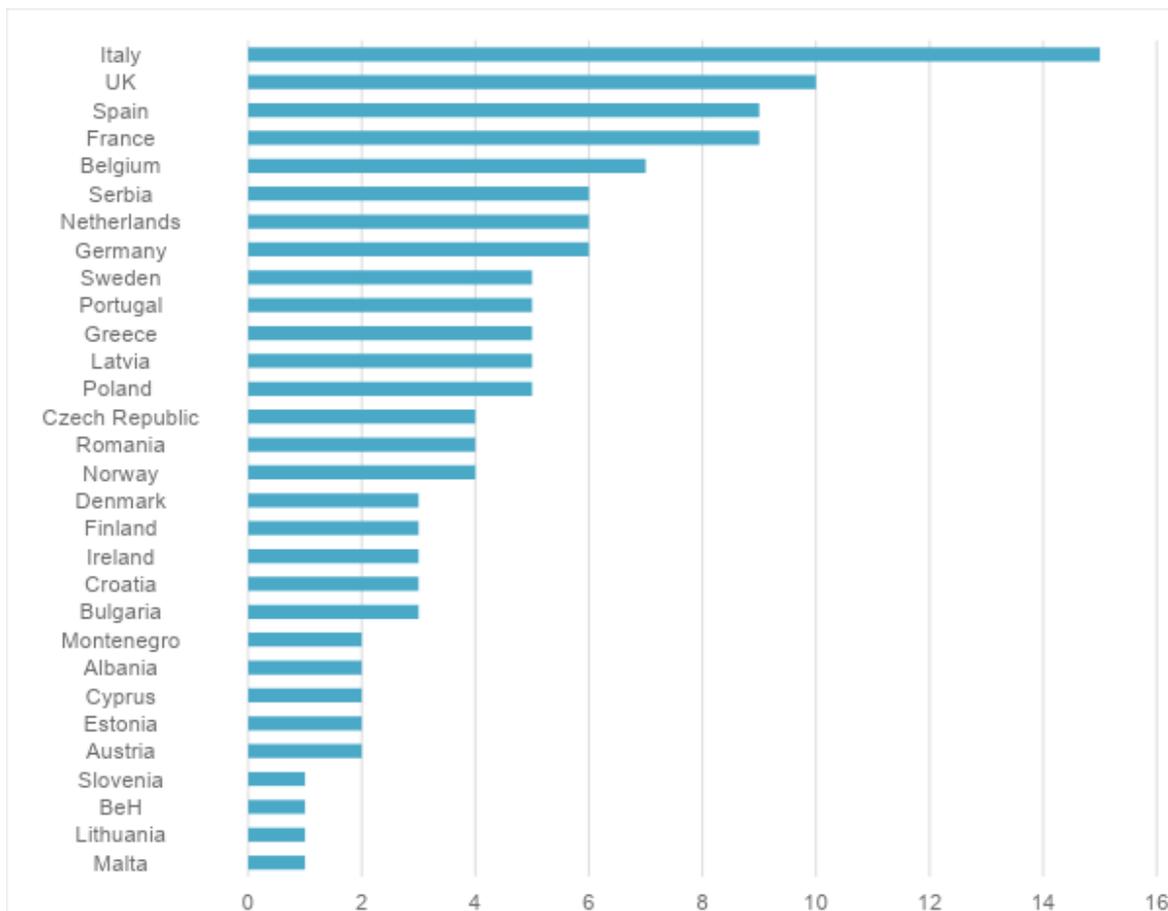


Figure 20: Main challenges faced by respondents regarding funding programmes

Source: IDEA Consult, based on data from the Perform Europe survey

- Second criterion: the projects focus on internationalisation and cross-border mobility of artists and cultural operators. It is important to stress that, although Creative Europe is in general a programme based on cross-border collaboration, not all the projects funded focus on internationalisation and cross-border distribution of artistic works. The second criterion applied to make a second screening is therefore based on the fact that the project's objective is clearly internationalisation and that the proposal clearly states that the outcome(s) of the project (in most cases new works) needed to be presented to audiences in at least one of the countries partners of the projects.
- Countries from Eastern Partnership and Tunisia have not participated at all in the 25 selected projects. In perspective, this data is not surprising. We observe that in fact overall the participation of the countries within this macro-region in Creative Europe cooperation projects is in general very low (almost 6% of the total number of cooperation projects in the Culture sub-programme funded in 2014-2020 involved countries from Eastern Partnership and Tunisia).

Based on this second criterion, **25** projects were identified. When screening them, we analysed the geographical coverage and the main themes tackled.

The figure above shows that:

- Western and Southern Europe are the macro-regions that overall take part in the highest number of projects, while Eastern Europe and the Balkans are the least participating macro-regions. In particular, the country that took part in most of the projects is Italy (15 cooperation projects), followed by the UK (10), Spain and France (9 projects each). The countries that took part in the fewest cooperation projects are Malta, Lithuania, Bosnia and Herzegovina and Slovenia (1 project each). The results are aligned with the overall participation rate of the macro-regions in cooperation projects within the CE Culture sub-programme. Western and Southern Europe have in fact an overall participation rate of 83% and 70% respectively, while the Balkans are the macro-region with the lowest participation rate (20%). Northern and Eastern European macro-regions' countries are in the middle of the ranking, and this result is also in line with their overall participation in the CE Culture sub-programme (44% and 61% respectively).
- A further step in the analysis was to identify the **main themes** the projects focused on. The table below presents the main topics, their brief description and the number of projects covering the topic. Please note that most projects focused on more topics at the same time.

The screening of the main topics touched by the selected projects reveals that:

- Cross-border mobility is considered a valuable opportunity for artists; not only to strengthen their international network but also to deepen and broaden their knowledge and artistic vision.
- The projects funded also show that there is an interest in the positive impact that bringing international artists and showing their works can have on audiences and communities in the host countries.
- The exchange between artists and audiences and local artists in the host countries is considered as important to fostering discussions on cultural diversity and enabling a discourse on acceptance and inclusivity.
- A good number of projects focus on the connection between the topics of cross-border mobility and equity and inclusivity of disabled, BIPOC and LGBTQI+ artists.

Topic	N° Projects
International networking	22
Artistic and professional development	17
Audience and community engagement	17
Development of the sub-sector	13
Equity and inclusivity	11
Identifying new trends in the specific art sector	4
Creating a connection between the cultural heritage and citizens	3
Digitalisation	3
Connecting citizens with urban space	3

Table 4: Main themes covered by the selected 25 projects
Source: IDEA Consult

Mapping and analysis of Creative Europe platforms and networks

The Creative Europe Culture sub-programme finances four platforms and four networks active in the performing arts. As proved by annual monitoring reports¹¹, all of them play an important role in connecting performing arts professionals, maintaining long-lasting relationships, creating training and capacity building opportunities and generating sound cross-border touring and distribution opportunities.

The Platforms aim at identifying promising emerging young talents and providing them with support, exposure and insights to launch their international career. Each Platform has a unique mechanism to support new talents, such as offering competitions and showcases, organising festivals and providing coaching and mentoring by established artists in the field. In addition to fostering new talent, another aim of the Creative Europe platforms is to promote audience development. To achieve these goals, the Platforms support and encourage transnational collaboration between artists and presenters¹². In the 2017-2020 period, Creative Europe supported 15 platforms¹³, four of which are active in the performing arts. The 15 platforms involve more than 230 organisations from 37 countries. During this period, more than 800 showcases have been organised, with more than 6.000 emerging artists¹⁴.

11 Creative Europe monitoring report 2019. Published: 2020-09-02 https://www.euneighbours.eu/sites/default/files/publications/2020-09/KK0220378ENN.en_.pdf

12 Creative Europe Platforms, 2020. <https://op.europa.eu/en/publication-detail/-/publication/9e3befbd-a0c9-11ea-9d2d-01aa75ed71a1/language-en/format-PDF/source-search>

13 Creative Europe monitoring report 2019. Published: 2020-09-02 <https://op.europa.eu/en/publication-detail/-/publication/f16e7fc0-ecc3-11ea-b3c6-01aa75ed71a1/language-en>

14 Creative Europe monitoring report 2019. Published: 2020-09-02 <https://op.europa.eu/en/publication-detail/-/publication/f16e7fc0-ecc3-11ea-b3c6-01aa75ed71a1/language-en>

Creative Europe Networks are member-based structures playing a crucial role in strengthening and developing the CCS, while promoting smart, sustainable and inclusive growth. In addition to this, networks play an important role in endorsing the peer-to-peer exchange of knowledge and know-how in the internationalisation of artists' career, being connectors of organisations across borders. Finally, Networks are representative bodies consulted by the Commission and help design EU cultural policies¹⁵. From 2017 to 2020, Creative Europe financed 28 pan-European Networks, which represent more than 4.500 cultural and creative organisations¹⁶. Four of those Networks are active in the field of the performing arts.

V MAPPING AND ANALYSIS OF EXISTING DIGITAL TOOLS

State of affairs on digital strategies and tools uptake

In the past few years, performing arts have undergone a significant change thanks to the usage of digital strategies and tools - before and during the Covid-19 pandemic - which augmented the interaction of live art with the digital world. The uptake and use of digital strategies and tools are opening doors for new ways of artistic creation and distribution, and are profoundly changing the way in which the performing arts sector is organised, although not without challenges¹⁷. Digitisation has impacted the core segments of the performing arts **value chain**, but also **other processes within** the value chains, such as negotiating contracts, arrangements with respect to payments or personnel matters, managing audio-visual material, networking and matchmaking.

15 Creative Europe Networks, 2019: <https://op.europa.eu/en/publication-detail/-/publication/1e4ce5f2-8508-11ea-bf12-01aa75ed71a1/language-en/format-PDF/source-search>

16 Creative Europe monitoring report 2019. Published: 2020-09-02. <https://op.europa.eu/en/publication-detail/-/publication/f16e7fc0-ecc3-11ea-b3c6-01aa75ed71a1/language-en>

17 O. Kulesz, *Supporting Culture in the Digital Age*, IFACCA, March 2020; IETM, *Live arts in the virtualising world*, May 2020; IETM, *The moment for change is now*, December 2020.

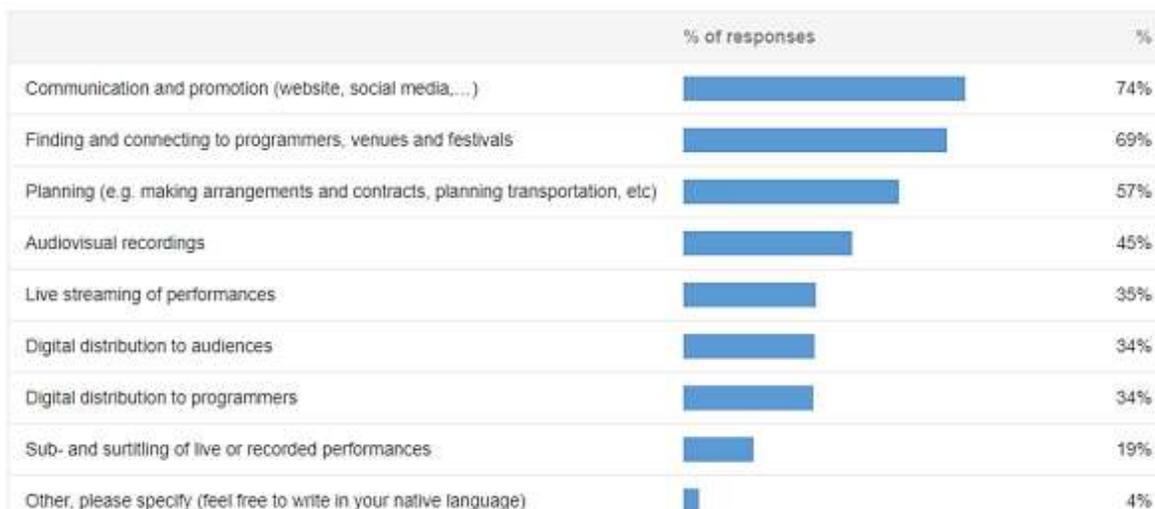


Figure 23: Purposes for using digital tools (creators/producers)

Source: IDEA Consult, based on data from the Perform Europe survey

Some questions in our large-scale survey focused on the **usage habits** of producers and presenters. The figures below show for which purposes producers and presenters have used digital tools (in the context of touring and distribution actions). We can observe that the main purposes for which both have used these tools are similar.

Review and analysis of digital tools

Although in recent times numerous reports have been published on the topic of digital strategies in the performing arts, at the moment there is no comprehensive research in the European context that focuses on the mapping and analysis of currently existing digital tools that facilitate performing arts distribution. Perform Europe's mapping is therefore the **first attempt to map these tools in all the 40 Creative Europe countries and the UK**.

Digital tools are defined as all digital facilities (e.g. software applications, digital platforms, virtual spaces or physical tools) that are explicitly developed for the performing arts sector. By digitising the processes they facilitate different aspects of touring and distribution of

performing arts works, such as matchmaking, mapping, digital presentations for consumers, sub- and sur-titling, streaming, broadcasting and live recording of digital facilities, promotion systems, ticketing and planning systems.

A total number of **161 digital tools** were collected. As Figure 25 below shows, most of them are concentrated in a few countries: Spain, Austria, Ireland, Netherlands, Belgium, Portugal and the United Kingdom.

In regards to the characteristics of the digital tools collected, the text and figures below provide an overview about their cost structure, business models, function and provider.



Figure 24: Purposes for using digital tools (presenters/programmers)

Source: IDEA Consult, based on data from the Perform Europe survey

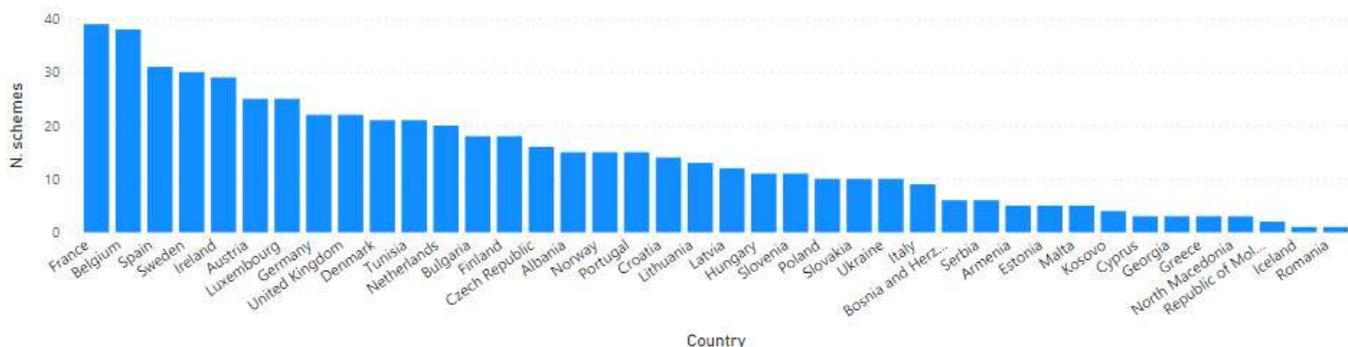


Figure 25: N. of digital tools by country (in absolute numbers)

Source: IDEA Consult

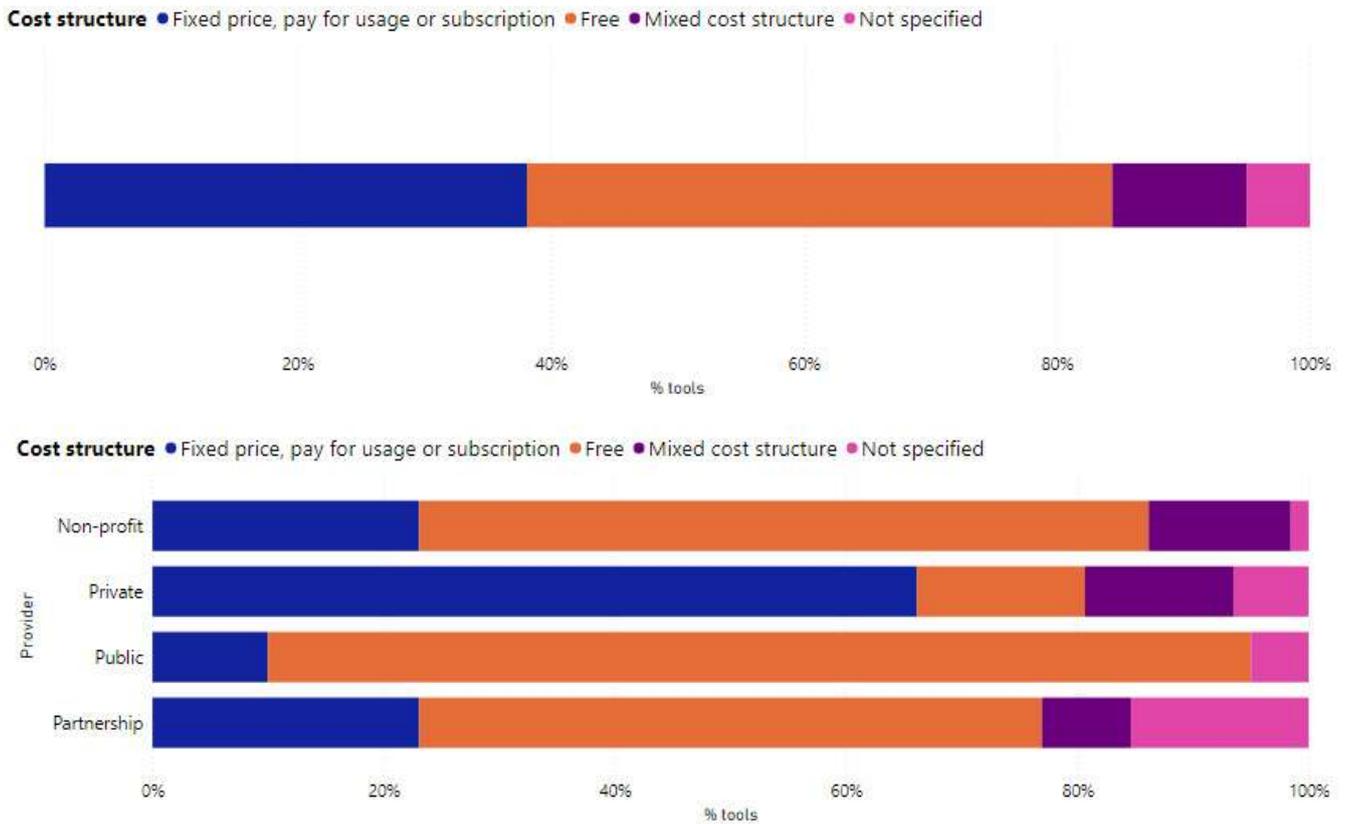


Figure 26: % digital tools by cost structure
Source: IDEA Consult

Cost structure

One of the tools' characteristics that we focused on is the cost structure. The figure below shows that most of the tools (46%) are free for use, while a slightly lower percentage of them (38%) have either a fixed price, a pay-for-usage model or can be used upon subscription. Only 11% of the tools have a mixed cost structure, which also means they offer a diverse set of services. Most of the tools provided by public entities (85%) and nonprofit entities (63%) are free for use, while the opposite situation occurs in relation to the tools provided by private companies (66% fixed price, pay for usage or subscription).

- **Business model.** As Figure 27 below shows, almost half of the tools collected (49%) have a B2C model (targeting consumers/audiences), while only 26% provide services for performing arts professionals and organisations. 25% of all collected tools have a mixed business model, thus meaning that they address both consumers and professionals.
- **Function.** In total, only 18 out of the 161 tools aim at matchmaking and fostering B2B connections. In the figure below, these tools are spread over the “matchmaking” and the “mixed function” categories.

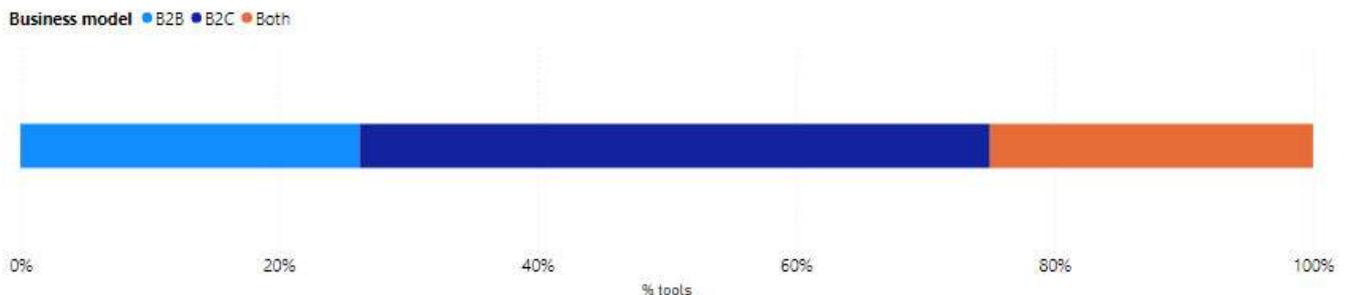


Figure 27: % tools by business model
Source: IDEA Consult

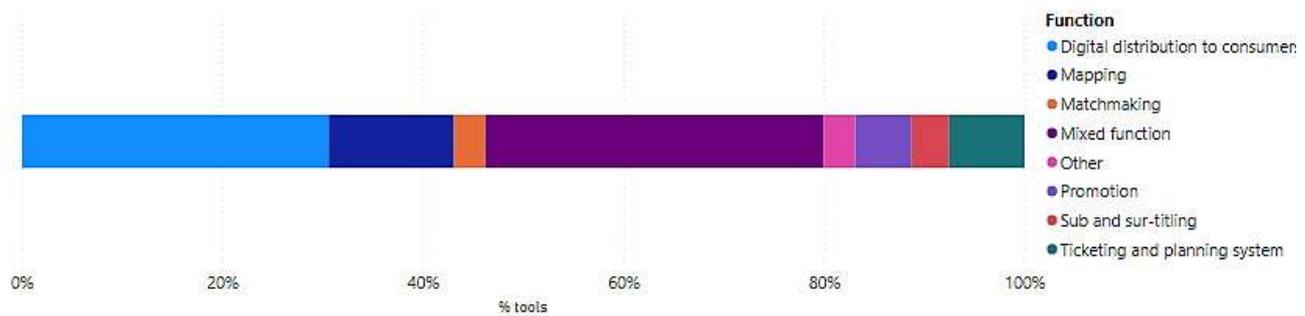


Figure 28: % digital tools by function

Source: IDEA Consult

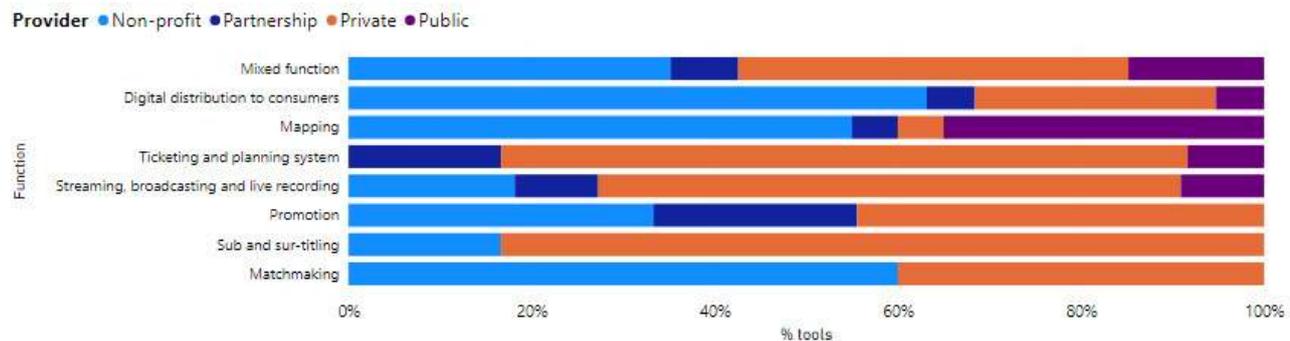


Figure 29: % tools by function and provider

Source: IDEA Consult

If considering both the single-function tools and the mixed-function ones, the function that most of the tools perform is that of digital distribution to consumers and audiences, including streaming, broadcasting and live recording. The third most frequent function is mapping - digital tools that help gain an overview of relevant players in the field and find funding opportunities for mobility/distribution purposes.

- **Provider.** We observe that 41% of tools are provided by non-profit organisations and 39% by private entities. Only 12% of all the tools collected are provided by public entities and only 8% by a public, private and/or non profit partnership.

When cross analysing the tools' functions and types of providers we notice that, not surprisingly, almost all the ticketing and planning system tools (75%), those aimed at streaming/broadcasting/live recording (64%) and those for sub and sur-titling (83%) are provided by private entities. On the contrary, the tools used for B2C distribution, mapping and matchmaking are mainly provided by non-profit entities, such as cultural institutions, sectoral networks, umbrella organisations or info points. The role of public entities as providers is preponderant as regards digital tools with a mapping function (35%), while they are completely absent when it comes to providing tools for promotion, sub-/surtitling and matchmaking purposes.

Sustainability

A final important step in the analysis was the evaluation of the level of sustainability of the digital tools. Correspondents were asked to evaluate the tools available in their countries, in relation to how they are tailor-made, affordable, accessible and user-friendly.

The main insights are as follows:

- The three macro-regions with the least sustainable situation are Eastern Partnership and Tunisia, the Balkans and Eastern Europe. As pointed out in the introductory paragraph to this section, in these three macro-regions, there is a general lack of digital tools. Secondly, with regards to the few available tools, they are not sufficiently tailored to the needs of the sector, not user-friendly and, at least in the Balkans and Eastern Partnership and Tunisia, not affordable and hardly accessible.
- The situation in Southern Europe is quite unique, as within the macro-region cluster there are four countries where none or only a couple of tools are available; namely Italy, Malta, Greece and Cyprus. On the contrary, Portugal and Spain are not only the countries where most of the tools are placed overall, but also those with the most sustainable situation regarding the four key evaluation dimensions.
- Not surprisingly, the situation in Western and Northern Europe (the macro-regions with the highest number of existing tools) is quite positive with regards to all four dimensions.

VI ANALYSIS OF THE MAIN DRIVERS

In this section, the insights presented above are synthesised and expanded with input from the 25 interviews, desk research and the series of Perform Europe workshops (Internal Workshop, Perform Europe sectoral Brainstorms, Expert Camp). This section aims at discussing the dominant logics, dynamics, and contextual factors that can, at least partially, explain some of the observations with regards to the flows in the cross-border presentation of performing arts works.

Market logics and the 'cost disease'

First, let us look at the economics of performing arts touring and presentation. From the results of the Perform Europe survey, we learn that in the performing arts ecosystem, economic profit is not the main purpose nor the motivation for producers and presenters to engage in cross-border touring or presentation of performing arts works. Financial constraints, however, do play an important role. Presenters mention **budget considerations** as an important factor in artistic selections (Figure 9), and by far as the main obstacle to presenting work from abroad (Figure 10). For many artists, companies or producers, generating income from international activities is important. To keep up a sustainable business, they rely on revenue from buyout fees and/or financial co-productions. This especially concerns artists and companies that are based in countries with a smaller internal market for the specific type of artistic work or disciplines they engage in. For instance, for a contemporary dance company from Portugal, Belgium or Slovenia, it will be very hard to develop a sustainable career without engaging in cross-border touring because of limited opportunities for domestic presentation. However, theatre companies from France or Poland – two countries with a sizable internal theatre market – might pursue different options. While they can choose to opt to be mainly active on the domestic market, they can also choose to pursue an international career.

While financial considerations might not be the main motivation, economic logics help to understand at least partially the flows of cross-border presentation.

Some of the imbalances and asymmetries we have seen in the mapping of the flows relate to more **general macro-economic differences**. In the interviews it was repeatedly mentioned that different economic contexts and standards of living have a substantial impact on the flows of traffic, because they impact the amount of buyout, co-production fees and the purchasing power of presenters. In the last decades, this has been levelled partially within the EU context, but it remains important – especially in regards to the traffic between EU Member States and non-EU countries, e.g. Eastern Partnership.

Other imbalances specifically relate to the **market predicament of the performing arts** and the level of its dependence on government intervention. As early as the

1960s, William Baumol and William Bowen argued that the financial predicaments of the performing arts are not due to poor management or lack of quality¹⁸. According to them, it was a structural feature of the theatre or orchestras market. They called it a '**cost disease**'. Practicing the performing arts professionally is relatively expensive due to the production costs. Rising labour costs cannot be compensated for by a similar increase in productivity.

There are two important types of costs related to a performance: costs related to the production of a play (fixed costs or production costs) and costs related to each presentation of a play (marginal costs). Economically speaking, these two types of costs should be charged to the consumer along with a profit margin in order to be financially profitable and sustainable. The main problem in the performing arts sector is that due to the labour-intensive nature of the sector, the sum of fixed and marginal costs is too high to be reflected in the final ticket prices¹⁹. The cross-border nature of the performance only adds to this predicament due to additional costs for travel, accommodation and subsistence.

In addition to the issue related to production costs, the nature of the business model (products versus services) and the size of the audience (popular or niche) also play an important role. First, staging a performing arts piece is not a product that can easily be multiplied and cross the boundaries of time and space. Second, any live artist who opts for the stage and fails to serve thousands of people simultaneously will have a hard time breaking even. On the basis of these three elements – the production cost, the nature of the business model and the size of the market – researchers at the Faculty of Economics (KU Leuven) have developed a typology that helps to explain which art forms can operate based on the market logic and which cannot:

Figure 30 shows not only the possibility of organising a diversity of art practices according to market dynamics. It also mentions different business models which can be deployed. We see that commercial theatre and musicals can only develop a sustainable activity because they appeal to a larger market, allowing them to deploy a number of business models simultaneously. The model also shows that performing arts appealing to a more limited or niche audience have always been in need of a third payer outside of the regular market, such as government funding, private donors, or – as hinted by the survey results – artists and producers themselves investing in their international visibility²⁰.

18 W.J. Baumol and W.G. Bowen Performing Arts. The Economic Dilemma. A study of Problems common to Theater, Opera, Music and Dance. New York, The Twentieth Century Fund, 1966.

19 IDEA Consult et al., Mapping the Creative Value Chains, 2017: <https://eusea.info/wp-content/uploads/2019/06/Mapping-the-value-chain.pdf>.

20 Martinus Buekers, Rudi Laermans and Bart van Looy, Wat met... Kunst en geld? Lannoo, Tielt, 2014, p. 51

Size of the market	Production Costs	The potential of the product to cross boundaries (time/space limits)	art forms	Sustainable market potential	Sustainable business models
Significant	low - average	limited - absent	pop, rock, stand up comedy	yes	ticketing, merchandising, sponsoring, advertising
		present	writing, songwriting, recording, painting, visual art	yes	selling products, royalties
	significant	limited - absent	musicals, pop/rock (festivals), commercial theatre, dance, circus	yes	ticketing, merchandising, sponsoring, recording (limited)
		present	film	yes	ticketing, royalties, product sales, sponsoring, advertising
Limited	low - average	limited - absent	amateur theatre, classical music, jazz, dance	yes and no	ticketing, merchandising, sponsoring, advertising, donations, government support, voluntarism
		present	writing, poetry, songwriting, painting / visual art	yes and no	selling products and royalties will not generate enough income, a minority will be economically sustainable
	significant	limited - absent	repertory theatre, independent/non-profit performing arts, contemporary classical music, opera, jazz, avantgarde music, contemporary dance, expos, museums	no	ticketing, merchandising, sponsoring, advertising, donations, government support, internationalisation catering, location services, merchandising
		present	film, visual art	yes and no	selling products and royalties will not generate enough income, a minority will be economically sustainable

Figure 30: Conceptual framework explaining differences in market dependence between art forms. Source: Martinus Buekers, Rudi Laermans and Bart van Looy, *Kunst en geld? Lannoo, Tiel, 2014, p. 52-53*

A diversity of organisational models for production and presentation of performing arts

As explained in the section above, the performing arts market, characterised by the so-called cost disease, is very much shaped by government intervention. The unequal distribution of support schemes for cross-border touring, presentation and digital tools across different macro-regions – carried out in the context of Perform Europe’s mapping phase – can help understand some of the imbalances in cross-border flows for performing arts presentation. For instance, one sees that artists, companies and producers based in macro-regions with a stronger support for cross-border performing arts distribution more often perform their work across the borders of countries and macro-regions, and beyond the borders of the area covered by Creative Europe.

However, this general observation needs to be nuanced and contextualised, since it might obscure the diversity of approaches, business models, institutional contexts and career paths existing within *countries* and *macro-regions*. Historically, the economic predicament of the performing arts and its interaction with public policies has led to a diversity of organisational models

for the production and presentation of performing arts, in which the cross-border aspect can be a structural feature, occasionally happening or completely absent²¹.

1. Many theatres in the 41 countries, which are in focus of this study, still operate as ‘**repertory theatres**’ with a fixed ensemble, certainly in Germany and in a number of former communist countries. In many countries this was historically the dominant form of public institutions in the performing arts. But because of the cost-intensity and a decreasing willingness by governments to invest, many have shifted into different organisational models. While some still adhere to the old repertory model, where a large and fixed ensemble plays different pieces each night, others produce on a project basis or have started

²¹ Dragan Klaić, *Resetting the Stage. Public Theatre between the Market and Democracy*. Bristol/Chicago, Intellect, 2011. Joanna Krakowska and Daria Odija, *Platform East European Performing Arts Companion*. Lublin/Warsaw, EEPAP, 2016. European Expert Network on Culture and Audiovisual (EENCA), *Main challenges in the European theatre sector Input for exploratory meetings and future EU actions*.

to work as programming venues. Because of their close connection to national cultural policies, the level of funding, their adherence to national theatre traditions and their focus on text-based theatre, these institutions mostly have a national rather than an international focus.

2. Along with the top-down development of a national theatre culture, the performing arts field as we know it today has also 'bottom-up' features: from the fin de siècle and interbellum small-scale venues in Paris and Berlin, over the small-theatre movement of the 1950s and 1960s (where intimate spaces were filled by small-scale productions focusing on new theatre writing), to the experimental and socially motivated groups in the seventies and eighties. Europe's performing arts ecosystem boasts a **wide diversity of travelling companies and collectives** for theatre, dance, circus and street arts. Many of them have a modus operandi which is production based: supported by production houses and through (international) co-productions, and sometimes with European support based on an artistic production or project where casts are assembled, financial and other resources are pooled, and tours are organised.
3. Apart from the national and/or state-owned institutions and independent groups, collectives and venues, there is a distinct third category of performing arts producers: **commercial theatres** in Europe. Today, Broadway (New York) can be seen as the epicentre of commercial theatre worldwide. In Europe, you can only find a similar phenomenon in London's West End, where several commercial theatres are grouped in one part of the city, and where you see a system of production and presentation which is intricately linked with global tourism. But also in many other larger European cities, there are commercial theatre companies producing accessible, potentially profitable shows, attracting larger audiences, in longer runs in big venues. Therefore, commercial production houses are often oriented to local markets in metropolitan areas.

In regards to the (cross-border) presentations there are also **myriad working models**, which have historically developed and may differ depending on a local, regional, national or macro-regional context. The diversity mentioned above with regards to production also relates to presentation of performing arts works:

1. Public institutions: repertory theatres or dance, ballet and opera houses and other state-owned institutions with a producing and/or presenting function.
2. Independent artist-run companies and collectives: with or without their own venues, with or without an international programme.
3. Production houses which are not artist-run and produce works, often in a system of co-production alliances with companies, production houses, festivals and programmed venues.

4. Larger commercial enterprises with or without their own infrastructure; sometimes programming commercial work made abroad.
5. Lastly, it is important to highlight the **specific role of festivals** in the organisation of the performing arts ecosystem in Europe. In many arts disciplines and cultural fields in Europe, throughout the last decades, we have seen the increase of festival initiatives who have played a significant role in the internationalisation of performing arts presentation²².

Differences in terms of organisational model also concerns the circus sector²³, where it is possible to make a distinction between:

6. **Traditional/classical circus companies:** shows that are most often presented in a touring tented format, featuring act after act. The acts are usually predetermined, leaving little room for improvisation. There are very large internationally operating circus companies and also a very large number of often family-owned circus companies; and
7. **Contemporary circus:** performances and shows are likely to be devised by the ensemble, often utilising the artists as authors of the piece or performers. Contemporary circus companies often perform in theatres, community centres and festivals (indoors or outdoors) and generally encompass multi-genre productions that overlap with other performing arts disciplines such as theatre, dance, visual arts, music and new technologies.

With this diversity of approaches in mind, it is clear that international touring is part of the business model of a specific type of organisational practices. Cross-border touring is most important for the sustainable organisational development of individual artists and smaller and independent groups that work (partly) with or without government funding. Because of limited funding, these performing artists and companies often have a distinct international focus: international touring and co-production is part of their business model. The Perform Europe mapping of support schemes show that especially for this part of the field, opportunities differ greatly depending on the policy context. While in several European countries intricate subsidy systems have been developed for independent companies (for instance in the Netherlands, or the Dutch-speaking part of Belgium), in many countries the opportunities for funding for the independent field are quite limited, because the state-run institutions get by far the largest share of the budget. Funding opportunities for or even the recognition of specific disciplines (for instance, contemporary dance, circus or street arts) also differ from country to country or region to region.

²² European Festivals Association, Europe for festivals, festivals for Europe - The Guide. Tiel, Lannoo, 2015.

²³ Panteia et al., The situation of circus in the EU Member States, 2020: <https://op.europa.eu/en/publication-detail/-/publication/11bd70ea-33bb-11ea-ba6e-01aa75ed71a1>.

A diversity of policy approaches

This diversity in organisational models coincides with a diversity of policy approaches towards the performing arts field. In section 2.1.3, the focus was mainly on the mapping and analysis of specific support schemes for cross-border distribution. Also, this needs to be contextualised. These schemes are part of broader performing arts policy frameworks, whose general characteristics impact the occurrence and sustainability of cross-border touring and presentation, both regarding export and import.

1. Public policies might support mainly **public** institutions and/or provide more elaborate frameworks supporting **independent** organisations; the recognition of specific subdisciplines within the performing arts differs too. As mentioned above, a good level of support for the independent scene might lead to specific incentives to support travelling companies pursuing an international career. On the other hand, the domestic lack of support might be an incentive to internationalise one's work, by seeking revenues from international collaboration, co-production and commissions abroad.
2. A centralised or decentralised approach concerning **the geographic distribution of performing arts venues across the territory**. Think of the 'scènes nationales' in France, a decentralised network of venues in different performing arts disciplines, recognised and funded on the national level. In the interviews, current investment at national level in the rural cultural infrastructure was mentioned to be low.
3. In many countries, performing arts presentation is a **shared responsibility between different government levels**. A diversity of situations with regards to the division of tasks and responsibilities between different government levels (national, regional, provincial, municipal, etc.) which often interact in very specific ways and sometimes have an unintended impact on incentives for cross-border presentation²⁴.
4. Performing arts policies are embedded and **nested**

²⁴ In the Netherlands, for instance, there is a circuit of 'schouwburgen' mainly funded on the municipal level. Companies are subsidized on the national level. They are funded not only to produce work, but also to tour this circuit, even with quantitative criteria attached to it (which might mean there are less incentives to present in other countries).

in broader policy paradigms, with specific features impacting opportunities for the cross-border performing arts touring and presentation.

- a. As mentioned above, frameworks for international cultural policy or cultural diplomacy initiatives (national institutes, embassies) have an impact on asymmetries in the flows of cross-border touring and presentation. These are embedded in broader geopolitical policy frameworks. Priorities for international cultural collaboration are often embedded in specific social and historic contexts and identifications, for instance the broader political context for cultural collaboration in the Nordic countries, common history of non-aligned countries, bilateral agreements between countries, language policies, colonial histories and post-colonial relationships, migration histories, trade relations, etc.
- a. Specific performing arts policy incentives towards inclusion or sustainability are embedded in larger policies for sustainability and inclusivity (rural touring, disabled artists, ecological sustainability, etc.)

Clearly, inequalities with regards to cross-border presentation do not happen in a vacuum. Respondents via interviews and surveys indicate that these inequalities with regards to presentation are related to complex systemic issues within performing arts ecosystems. When support for cross-border touring and presentation is lacking, this often coincides with other gaps such as a lack of opportunities for the development and production of performing arts works, as well as a lack of support for promotion and network development. It also means a lack of infrastructure, equipment and space, and a lack of opportunities for education, capacity building and professional development. These gaps strengthen each other, and issues with regards to touring and presentation only manifest at the end of the value chain. Gaps related to access to education, professional development, artistic development, creation and innovation might result in the fact that there is no qualitative work that can go on tour. On the performing arts market, there is no "equal competition" between works, when they originate in contexts with unequal resources and room for development. In other words, there is no such thing as a "level playing field" for cross-border performing arts productions because of the diverse conditions for education, artistic and organisational development and creation.

This unequal access to resources for development, production and presentation is not only related to geographic parameters, or distinctions between public institutions and independent players. For a project aiming at more balanced, sustainable and inclusive practices, it is important to recognise that this is also related to privilege. There are many issues concerning the accessibility to the system for a number of unprivileged groups, artists as well as audiences. There are inequalities

regarding race, ability, gender, gender identity, ethnic background, sexual orientation, migrant status, socio-economic background – and the complex intersections between such parameters – having a strong impact on access to education, professional development, infrastructure and financial resources for artistic development, creation and – ultimately – presentation opportunities. As research shows²⁵, people of African descent in the EU still face widespread and entrenched prejudice and exclusion and experience severe barriers to access to education and employment, although with important country differences. Similar barriers are faced by LGBTQI+ people across Europe. A very recent survey shows that they experienced discrimination for being LGBTQI+ in employment and in other areas of life, such as education settings²⁶. When looking at these inequalities in the European arts context, there is a clear research and data gap. When available, information is often country-based and shows vast discrepancies between countries, especially west and east²⁷. Some relevant Creative Europe cooperation projects are now tackling the topic of access and participation for BIPOC and LGBTQI+ artists, such as Invisible Lives, SLATE, Black.Art.World and Centre Stage²⁸.

The point can be illustrated referring to the situation of artists and audiences with disabilities²⁹. International exchanges for artists with disabilities are as essential for their artistic and organisational development as it is for able artists. But there are many differences between countries when it comes to providing access to art professionals with disabilities. As remarked by research

and running projects³⁰, there exist different perspectives of disability within our society. In many countries, there is still prejudice and unconscious bias towards disabled artists and barriers at initial stages. Training in the arts in arts schools, for example, is often not extended to disabled people, and the all-important networking can be a challenge too, especially for deaf artists. With regards to touring and presentation, disabled artists face severe barriers in the cost of showcasing or touring their work: their work sometimes may cost more because there is an extra team member in the touring company, or a sign language interpreter needs to be paid, therefore making them not a priority and losing out to cheaper companies. From the perspective of the artists, there are diverse approaches to the topic: on one side, some disabled artists want their art to become mainstreamed (no distinction between performances by artists with disabilities and those with no disabilities); on the other, some artists think that the disabled nature of those artists should be highlighted, remarked and that there should be a 'positive discrimination' (e.g. they should be considered in a separate programme to raise awareness and receive attention). Some recent publications give voice to artists with disabilities to share personal experiences and points of view³¹.

New technology is being developed and enormously helps artists and audiences with disabilities (e.g., sign language translator). The uptake of this technology needs skills, resources, professionalisation and an increased consideration of the topic of disability. Digital strategies (especially in Covid-19 period) facilitated presentation and exchange for artists with disabilities, but also for audiences with disabilities (relaxed performances).

Ecological awareness and privilege

Environment and climate change are essential aspects of the holistic approach to sustainability. Obviously, cross-border mobility of people and sets do leave a carbon footprint. In recent years, a more general awareness and urgency concerning the impact of human behaviour on climate change have increased.

25 European Union Agency for Fundamental Rights, Being Black in the EU/Second European Union Minorities and Discrimination Survey, 2018: <https://fra.europa.eu/en/publication/2018/being-black-eu#TabPubKeyfindings2>.

26 European Union Agency for Fundamental Rights, A long way to go for LGBTI equality, 2020: <https://fra.europa.eu/en/publication/2020/eu-lgbti-survey-results>.

27 Arts Council England, Equality and diversity within the arts and cultural sector in England: https://www.artscouncil.org.uk/sites/default/files/download-file/Equality_and_diversity_within_the_arts_and_cultural_sector_in_England.pdf; EU Sexual Diversity, A Comparative Study of LGBTQ Rights and Art in the UK and Poland within the Context of the EU Idea of Sexual Diversity, EU-funded research under the FP7-PEOPLE programme: <https://cordis.europa.eu/project/id/253662>.

28 <http://kultura.kreativnaevropa.rs/eng/2020/10/27/invisible-lives/>; <https://eclipse theatre.org.uk/slate>; <https://www.creativeeuropeireland.eu/culture/projects/case-studies/centre-stage>.

29 Relevant country profiles have been redacted on the topic, in the context of the Europe Beyond Access project. The profiles are overviews of the disability arts sector in specific locations, either written by local experts or a journalist: https://www.disabilityartsinternational.org/resources/?_sft_resource=country-profile.

30 Some of the most relevant projects are: [Europe Beyond Access](#), [Sign & Sound Theatre](#), [Beyond Signs](#), [BET – Body Experience Time](#).

Further, see M. Prandelli on behalf of IETM, Loud silences, 2019: <https://www.ietm.org/en/publications/loud-silences-languages-accessibility-and-cultural-hegemony>; Crossing The Line project: "The biggest challenge is often not the disabilities of the artists, but rather the preconceptions of people around us and the expectations from the surrounding world on what we should and should not be" (<https://www.crossingtheline.eu/arts/>). Crossing The Line is an artistically led network, committed to meeting the new challenges of producing and touring theatre made by learning disabled and non-disabled theatre makers.

31 K. Marsh and J. Burrows on behalf of IETM and in partnership with the British Council, Permission to stare, September 2017: <https://www.ietm.org/en/publications/fresh-perspectives-7-permission-to-stare-arts-and-disability>.

Generally, environmental considerations are gaining ground in reflections concerning the modes of production, distribution and presentation within the performing arts. The role of transnational networks and organisations focusing specifically on environmental sustainability in the arts and/or touring, such as Julie's Bicycle and Touring Artists, has certainly been crucial in triggering discussions on environmental issues and stimulating critical reflections on deep socio-economic and geographical inequalities preventing from finding a 'one-fits-all' solution³². While for ten to fifteen years, this issue has mainly been raised by pioneers, the urgency has certainly increased in the past years and raised broader interest within the performing arts field, resulting in an increased reflection on and the development of concrete tools promoting environmental sustainability. This concerns not only strategies and tools to reduce carbon emissions - it is also related to a more fundamental debate on the specific role the performing arts can play in the broader transition towards a just and sustainable society. Companies, festivals and venues take up an exemplary function in reducing their carbon emissions. Artistic and cultural projects can play an important role in stimulating the collective imagination about what a more just and sustainable future might look like - or not. The last few years, some Creative Europe projects have been focussing on exploring these opportunities, often via artist-led experiments (Cultural Adaptations, Imagine2020, among others).

In the context of the mapping and the analysis phase of Perform Europe, we have looked more closely into current trends related to environmental sustainability of cross-border presentation of performing arts works. Currently, the evaluation is ambivalent, both with regard to trends in artistic practices and in relation to the way support schemes deal with environmental sustainability. In interviews it was mentioned several times that a mind shift is taking place and that many artists and companies are increasingly integrating ecological considerations in their decision-making frameworks. For instance, intercontinental touring and air travel, especially for shorter tours, have become less evident and more debated. In some contexts, experiments are being set up with diverse strategies for reducing carbon emissions, such as development of tools for calculating and compensation of carbon footprint, downscaling productions, promoting train travel, and exploring alternative models for international co-creation (such as re-creation of productions in other countries/continents with local casts and locally produced sets).

32 N. Skolczyk on behalf of IETM, Climate action and the performing arts, December 2020: <https://www.ietm.org/en/publications/climate-action-and-the-performing-arts>. Several relevant guides on green mobility and charters for a sustainable cultural mobility have been compiled over time, by On the Move, Julie's Bicycle and Touring Artists. Please find here the links to their databases: <http://on-the-move.org/mobilityhottopics/environment/>, https://juliesbicycle.com/category/resource_hub/ and <https://www.touring-artists.info/en/home/mobility-and-sustainability/>.

While these experiments and considerations are increasing, it is also clear that they are interlinked in a complex way with many of the inequalities mentioned above. In the survey answers, we see that ecological considerations seem to be more prioritised in the North, West and East of Europe, and much less considered in the South, in the Balkans and Eastern Partnership countries. The importance and prioritisation of ecological awareness is clearly and explicitly interlinked with some of the inequalities discussed above. In the context of unequal access and privilege, should ecological sustainability be prioritised, even if it risks enhancing existing privileges and inequalities? In the Perform Europe mapping process, this was a recurring topic in interviews and workshops. In the regions where the data clearly indicate a situation of isolation, it is often mentioned that the primary concerns are breaking the isolation and developing international connections. Many respondents fear that, if ecological considerations lead to a more restrictive approach towards travelling, it would only aggravate the current situation of artistic, social, and economic unsustainability.

During the time of the mapping phase, Lázaro Gabino Rodríguez – one of the driving forces behind the Mexican artists' collective Lagartijas tiradas al Sol – sparked a broader debate about the complex balance between ecological awareness and fairness in a global context, in an open letter to the French choreographer Jérôme Bel³³. In 2019, Bel declared that he stopped flying, which has changed his vision on producing and distributing his work (leading to a.o. to Skype rehearsals and working with different casts on different continents)³⁴. Rodríguez framed this decision as a matter of "privilege": "One of the issues we face in the climate crisis struggle is that we all are in the same boat, but we travel in different seats." Historical responsibilities differ, so do the opportunities to adopt greener transport means. Obviously, these complexities play out in a global context, but also in the geographical space of the 41 countries in focus. Sustainability values may be shared throughout the whole Creative Europe region, but in the complex balancing exercise that all performing arts professionals are dealing with, priorities may diverge in relation to the diversity of geographical and institutional contexts.

Covid-19 increased inequalities and accelerated (digital) innovation

Obviously, the Covid-19 pandemic has been very impactful with regards to the current situation for the cross-border distribution of performing arts works. In the period between spring 2020 and winter 2022, many venues and festivals were partially or completely closed, and dozens of events were cancelled. Furthermore, cross-border traffic was very much restricted during several waves of lockdowns. This means that the cross-border physical touring of performing arts works came to a

33 <https://e-tcetera.be/open-letter-to-jerome-bel/>

34 Interview to Jérôme Bel: <https://bit.ly/3wvGcrU>.

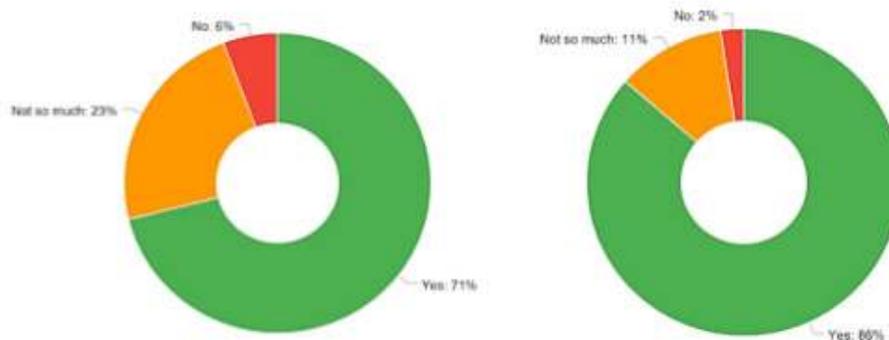


Figure 31: Answers to the question ‘Has your use of digital tools increased during the Covid-19 pandemic?’ (Above: response by producers (N: 695), below: response by presenters (N: 169))

Source: IDEA Consult, based on data from the Perform Europe survey

halt for a long time, with some intervals of reopening. Studies have revealed that the pandemic had destructive effects on the broader cultural and creative sectors, and the performing arts sector was among the hardest hit. ‘Since the Covid-19 pandemic hit Europe in spring 2020, the CCS have been among the most negatively affected sectors. The containment measures that have been put in place throughout the EU have led to a chain of effects, severely impacting the economic and social situation in the CCS. Especially the venue- and visitor-based sub-sectors such as the performing arts and heritage were most severely hit. Furthermore, the crisis has highlighted the very vulnerable position of many non-standard workers in the CCS, such as artists, freelancers or temporary workers³⁵.’

Even if the performing arts field was severely affected as a whole, it is also clear that not all players in the performing arts ecosystem were impacted in the same way. Perform Europe’s survey respondents, participants in workshops, and interviewees stressed that the current **inequalities mentioned above were deepened by Covid-19**, in the sense that those who were already in a more vulnerable position were impacted the most - for example those with less access to government support also having less access to compensation measures or specific relaunch budgets. In the interviews, specific concerns were mentioned concerning the position and survival of freelancers and smaller independent players. One respondent talked about a “nuclear bomb” which has fallen on independent performing arts ecosystems with less government support, pleading for a support scheme which would invest in the overall recovery of these ecosystems: “A Marshall Plan for the performing arts is needed.” While Covid-19 certainly deepened existing (economic) inequalities, in many ways it has also been a leveller and an accelerator. The pre-Covid inequality

between those artists, companies and producers active in an accelerated system based on hypermobility and others suffering a lack of access and a sense of isolation has been levelled: for a brief moment, the sense of isolation was experienced by all.

While the current system for cross-border touring and experimentation came to a standstill and increased the pressure on the more vulnerable players, the hiatus also proved to be an **accelerator of experiments** with new approaches towards the (cross-border) presentation of performing arts. Evidently, the **increased interest in digital tools** and the digitisation of processes is an interesting example. 80% of the presenters 71% of the producers responding to the Perform Europe survey indicated that the pandemic led to an increase of their use of digital tools for cross-border touring and presentation:

Many experiments were set up in relation to the digitisation of all aspects of the value chain: development, creation, production, promotion, matchmaking, showcasing, network development, presentation. From open answers to the survey responses, interviews and discussions in workshops, one can conclude that the evaluation of this boost in the digital transformation of the performing arts field is mixed:

1. Often a distinction is being made between the digitalisation of business-to-business and business-to-consumer processes. Reservations are mostly made concerning artistic creation and the digital presentation of work. Many feel that digital or hybrid solutions for the presentation and distribution of performing arts works towards audiences - “in the way they are mostly done” - are **hardly a replacement** for the essence of live arts, being a collective and social experience.

35 IDEA Consult, Goethe-Institut, Amann S. and Heinsius J. 2021, Research for CULT Committee – Cultural and creative sectors in post-Covid-19 Europe: crisis effects and policy recommendations, European Parliament, Policy Department for Structural and Cohesion Policies, Brussels

2. Others see the **potential for innovation** and stress the importance of experiments and research to further investigate the artistic potential of digital and hybrid creation and distribution. To grasp this potential, investments in **artist-driven experiments are needed**, and current technologies and skills should be upgraded and developed.
3. Concerning digital tools for B2B processes – such as networking, matchmaking between producers and presenters or showcasing pieces – the advantages of new digital approaches are more than often pointed out as benefits of the digital shift after the pandemic. Many respondents stress the potential for more sustainable practices. Digital or hybrid showcasing, for instance, allows for knowledge exchange and matchmaking with a more limited ecological impact. It also allows for the inclusion of people with less access to mobility.

More generally, it is no coincidence that during the pandemic there has been an increasing number of (online) seminars, conferences, debates and calls for projects and experiments on how to rethink and reshape working internationally in the (performing) arts, including cross-border touring and presentation. This concerns not only digital experiments, but also other ways of connecting artists and audiences, embedding artistic practices in local communities, exploring international connections without travelling, and more fundamental reflections on the why and the how of cross-border touring and presentation. The pandemic accelerated a trend which had already started years before: there had been an increasing feeling that the current transnational system for the production and presentation of performing arts works—had come under increasing pressures. Many feel the desire to go beyond survival strategies (to remain active in an accelerated system) and work on a major systemic shift, towards more sustainable and fair practices with regards to the cross-border distribution of performing arts works.

2 THE DESIRED STATE

Beyond the pressures and imbalances presented above, what would the ideal situation of cross-border touring and presentation look like? We defined “sustainability” as ‘a situation which can be sustained over a longer period of time’. Which aspects are important, when discussing sustainability in artistic, economic, social, human and ecological terms? The vision of a more sustainable future for the cross-border presentation of performing arts, presented in this section, is the result of a co-creative research process involving a broad slice of the international performing arts sector. Preliminary results from the survey, interviews, desk research and country correspondents’ consultation were synthesised by use of the framework of the 5 values of sustainability.

Towards a more sustainable cross-border touring and presentation

I. Artistic sustainability

1. Artistic values are the centre stage as a force and catalyst in a broader societal context.

— *Artistic value is centre stage.* Respondents acknowledge unisono that the artistic value is the fundament of the performing arts ecosystem. Artistic choices should be free from market/political constraints.

— *Artistic value as a driver/catalyst of societal development.* The importance of artistic autonomy coincides with the belief that the performing arts practices and processes, precisely of their intrinsic value and specific logics, potentially have a unique beneficial impact on communities and societies.

— *Digital strategies and tools* – if they are used – should be in tune with and strengthen the artistic values of presented work and in general, the essential values of the performing arts, such as a collective and shared experience, artistic agency, etc. Artist-led experiments and explorations with digital/hybrid formats help to explore this potential.

2. Cross-border presentation of performing arts works is an essential condition for the development of local performing arts ecosystems.

— *For local ecosystems, presenting work from international artists is a source of inspiration and innovation,* it raises the “bar” and challenges standards and conventions. For local performing arts scenes to thrive, it is important that they can connect to the international landscape, being introduced to new work, voices, perspectives, formats, etc.

— *Innovation requires the possibility to take risks and to fail.* Artists should have the opportunities to experiment, develop, take risks, to fail and to learn from experiments. Presenters should have the means to innovate and diversify the program, to introduce new artists, voices, perspectives.

1. Time and space are crucial for artistic development, production and presentation.

— *Longer tours lead to an artistic return on investment.* Longer runs in one place, longer tours and the possibility of reruns stretch the lifespan for a performing arts production. This can mature the artistic work and enhance its artistic development over time.

- *Sustainable artistic collaborations*. There is a value in long term relationships between artists and presenters, who are following and supporting the trajectories of artists and companies over a longer period, thus building sustainable relationships with audiences and communities.
- *Slow art* is about having the necessary time and space to develop quality productions and share this under the right conditions with audiences. This includes time and space to scout or do prospection in order to develop a quality programme, time for residencies to explore local contexts, etc.

II. Social sustainability

1. Audiences having access, communities having ownership.

- *Audiences and communities should have access to a diversity of artistic perspectives* – from a diversity of contexts. In a democratic society, it is important that a diversity of voices and perspectives are heard and presented. For a democratic space, it is enriching that the idiosyncrasy of a diversity of artists' voices and perspectives from different parts of Europe and beyond can be shared. It is important that a diversity of communities have access to the art, including in rural and peripheral areas. Distance or connectivity of locations should not be an obstacle.
- *Accessibility on all levels* is an important precondition for inclusive practices. This includes the physical accessibility of venues, but also mobility, connectivity, accessibility of communication (physical/digital), relaxed spaces and performances, etc. A general awareness in combination with the right expertise and knowhow within the sector leads to inclusive arts practices.
- *Sustainability from the perspective of audiences, means continuous presence*. Travelling artists and productions come and go. Continuous presence and a structural approach towards audience engagement and community building is needed to create the right context for meaningful artistic exchanges.
- *Programmers and curators as “hyphens”, connecting artists to audiences*. The function of programmers is to be – in the words of the late Frie Leysen – the “trait d’union” between artists and communities. They not only select, but also create the right context and conditions for the work to be presented and contextualised. A diversity of voices can only be presented when there is a diversity of curators.
- *A shift from audiences to communities, diversifying practices*. Developing ownership by communities might lead to diversification of approaches towards curatorship and an adaptation of formats for presentations. Programmes can be the result of co-creative programming or curatorship. Performances

or shows are but one of the many possible “touch points” between artists and communities - also works in progress, digital connections, co-creative practices, access to archives and documentation, etc.

2. Time and space for the development of sustainable social connections between artists and communities

- *Slow art - time and space* are also necessary conditions to develop meaningful relations with local audiences. This includes longer runs in one place, that help to build audiences, but also the necessary time and space to expand activities beyond presentations, such as contextualising and educational activities, workshops and reflections with the local performing arts communities.
- *Long term perspective on the relationship between artists and communities*. Also, beyond the context of one performance run in one place, diversified formats and a long term approach will deepen the relationships between artists and audience. Sustainable relationships can be built by engaging audiences in creation processes, e.g., via residencies, open rehearsals, workshops, digital strategies, blogs, etc.
- *Trust and solidarity, in long term collaborations within the performing arts field*. When programmers follow artistic trajectories over a longer period, this helps them to develop sustainable relations between artists and audiences. Over time, trust can be built, when a spirit of generosity, collaboration, solidarity and shared responsibility is at the centre of relations in the performing arts sector.
- It is important to *create partnerships beyond the performing arts*, to diversify audiences and embed artistic presentations in a broader societal context.

3. The context-sensitivity and local specificity of artistic and social values

- *A context-sensitive approach to social sustainability*. Notions such as ‘diversity’ or ‘inclusivity’ are the most meaningful in relation to the hyper-specificity of local social and historical contexts.
- *A sense of place and rootedness*. It is important that programmers are aware of the specific place where the work they select is made. It is important that artists can engage with the specificity of the place where they travel to and perform. It is important that they can connect to this place and its communities. When a sense of place, rootedness, and local connectedness are becoming more important than the idea of the same “product” having a long run, this might lead to alternative forms of production and co-production (e.g., recreating pieces with local casts) and presentation.

- *From products to processes.* Performances or shows are but one of the many possible “touch points” between artists and communities. Works in progress, digital connections, co-creative practices and access to archives and documentation can also be points of “visibility” during the creation process.
- *(Cross-border) peer learning and sharing.* For building skills and capacities, it is important to set up the necessary frameworks to promote *education and capacity building, mentoring, sharing of information, knowledge and other resources.* International connections are a way of sharing experiences and thus strengthening contexts where there are less opportunities for professional development.

III. Human sustainability

1. Cross-border presentation as a form of recognition, personal growth and development for those involved

- As the survey results indicate, *professional growth and development*, recognition as artists with international potential or an international practice and the *artistic inspiration* which come from travelling are all important human benefits professionals associate with cross-border touring and presentation.
- *Work-life balance for artists and arts professionals is an essential condition for personal wellbeing and a sustainable professional practice.* This means that the pace of living and working as a travelling artist or arts worker allows for the development of sustainable family relationships and friendships in a private context.

2. Fairness as a guiding ethical principle in the performing arts ecosystem

- *Fairness is a central value and guided principle.* Fair practice is about a better labour market position for performing artists and performing arts workers. It is about fair remuneration as a condition for developing a sustainable socio-economic situation. It is about an ethics of solidarity, transparency about work and the negotiations in the organisation, the sharing of risks and resources, participation, trust, security, anti-sexism, anti-racism, decolonisation, democracy, ecology, diversity.

3. The skills, competences, capacities and knowledge needed for cross-border presentation.

- *The skills and capacities for professional development.* Artists and companies in all contexts have access to capacity building, with regards to the skills needed to develop their practices in the current system: artistic skills, entrepreneurial skills, a knowledge of the international performing arts context, digital skills, etc.
- *Diversification of skills.* In the light of a transition towards more sustainable performing arts practice, the skills and competences of performing arts professionals are very diverse. Other skills might need to be developed, other capacities need to be built, and cross-sectoral connections established. The skills one needs to engage and connect on the “market” remain important, but the skills and competences needed to “embed” artistic practice in a broader context (cross-sectoral, links with education, social practices) are essential too.

IV. Economic sustainability

1. Cross-border touring and presentation is part of business models which can be sustained over a longer period of time.

- *Economic profit is not a goal, but a means to an end.* Economic profit is by most not seen as a goal in itself, but in order to achieve the many benefits of international touring and presentation, an investment and resources are needed. In a market characterised by ‘the cost disease’, producers and presenters need access to the necessary resources to produce/tour/present performing arts works.

- *Cross-border touring is a way of achieving economic sustainability* for travelling artists and companies, especially in ‘niche’ disciplines, when the internal market is small or when the business model does not allow for longer runs in one place.

- *Longer and more compact tours are a return on investment.* Creating and producing require an investment of economic resources. So, longer tours in principle help optimising costs and generating higher revenues.

- *Fair remuneration* is an essential condition for a sustainable practice, also for those with the (economically) weaker positions in the ecosystem. This is not only about fair remuneration of the time/days for the presentation itself, but also about other contextualising activities, such as workshops, lectures, and educational activities.

2. Cross-border touring and presentation require substantial resources and investments, not only for funding the presentation of works, but also for the development of one’s network (and market)

- *Support for market development.* Developing the market does not only require resources for touring and presentation. It also requires financial resources for showcasing, networking, promotion/communication, scouting, prospecting, etc. as ways of developing one’s market opportunities.
- *Showcase opportunities.* It is important that the marketplace is organised: support for festivals, showcases, networks, digital platforms, etc. adds to the quality of exchanges, market development and other benefits.

- *Professional support.* A sustainable economic position requires acquiring skills for organisational development, fund-raising, establishing connections, promotion, entrepreneurship, etc.

3. Sustainable cross-border distribution is part of an economic system based on fairness, solidarity and sharing of resources.

- *Co-production and co-funding.* Sharing resources adds to the economic sustainability of operations. In the last decades, the internationalisation of the performing arts in Europe was boosted by producers and presenters pooling financial and other resources (knowledge, infrastructure, networks) via co-funding and co-production practices. Many business models are based on co-funding or co-production.
- *Experiments with sharing and solidarity.* In the context of a transition towards a more fair and equitable performing arts system, there are many experiments with solidarity economics and a fairer distribution of economic (and other) resources within the Creative Europe region.
- *Digitalisation of processes is essential* to share and exchange information and knowledge, broadening networks and creating opportunities.

V. Ecological sustainability

1. Cross-border touring and presentation via green practices and reduced/compensated carbon emissions

- *Green transport and distribution practices* can be achieved by promoting sustainable means of transport and distribution (e.g. travel over ground and preferably by train - if not, compensation of carbon emission for air travel, digital/hybrid presentation formats, including showcases, longer stays in one place, more compact tours in a region).
- *The greening of development and production practices* is important as well, and it leads to greener transport. This includes hybrid/digital networking, downscaling production, the local production of sets, artistic co-production with local partners, etc.
- *Digital strategies can help to reduce carbon emissions.* However, the environmental impact of digital tools should also be considered.

2. Linking ecological awareness to other values

- *A balanced decision-making framework.* Ecological awareness should be part of the decision-making framework of artists and presenters. Ecological sustainability should be in balance with other values, such as artistic autonomy and access to mobility, and the possibility to develop sustainable business models. Equity means that there should be a diversified approach of ecological sustainability, taking into account diverse forms of privilege and the possibilities in a diversity of geographic contexts.

3. The performing arts can play a meaningful role in the transition towards a more just and sustainable society.

- *Climate adaptation, not only mitigation.* Reducing footprint might not be enough to reach climate targets. There should be a fundamental reflection on what a sustainable performing arts practice entails in a society “determined to protect the planet from degradation, including through sustainable consumption and production, sustainably managing its natural resources and taking urgent action on climate change, so that it can support the needs of the present and future generations.”
- Rather than an inside-out approach (continuing what we do, but with reduced carbon impact), this might lead to an *outside-in approach where human activities are limited in order to reach climate targets.* How can performing arts practices – and in particular cross-border touring – be re-imagined in this context?
- Sustainable development goals are about the planet, but also about people and prosperity. Also in the performing arts, *climate adaptation should be in tune with social justice, in a global context.* It should allow not only those privileged to engage in meaningful cross-border connections, within the region covered by Creative Europe, but also in a context of global justice.
- *The performing arts have a positive and meaningful role to play in this transition.* This is not just about “doing less” or strategies to reduce impact, it is also about the unique role of the arts and culture as a democratic space for the collective imagination about a preferred future, sustainable and just in a global context.

Conclusions

The last step of our gap analysis consisted in confronting the current and desired state and drawing conclusions on the gaps preventing the desired state from being achieved. The gaps were identified based on a variety of inputs: the large-scale survey, the interviews, the two large brainstorms and the Expert Camp.

1 NEEDS AND PRIORITIES ACCORDING TO THE SECTOR

Two questions of the large-scale survey asked respondents to choose and prioritise first the most pressing personal needs and second broader priorities related to cross-border touring and distribution in the region where they are active. The answers to these questions were analysed by crossing data referred to the professional category and the geographical area (as for Table 5).

Based on the cross-analysis conducted, the following **key takeaways**, confirmed in all other research steps, can be highlighted:

- Almost all professional categories in all six macro-regions consider the creation of more international touring opportunities for artists from their regions as a priority in the broader geographical context where they are based. The most significant exception concerns Western Europe: the top priority for artists and producers is to slow down production and presentation models and create more space for artistic development, while both artist managers and presenters consider the development of more ecological ways of producing, presenting and touring as top priorities.
- While artist managers and presenters consider better access to finance as a priority, creators and producers assess that better access to the right connections within the performing arts is what they need most when talking about cross-border touring and presentation.
- The need to experiment with digital and/or hybrid presentation formats is considered as the second top priority need of presenters, while it is not even among the first four choices of artists, producers and artists managers.

2 GAPS: WHAT IS MISSING?

Based on the analysis of all the inputs received via the large-scale survey, the interviews, the two large brainstorms and the Expert Camp, we identified several gaps that were clustered as follows and presented in the tables below:

- **General gaps**, distinguishing between gaps on the individual/organisational level, performing arts ecosystem and broader societal context.
- **Policy and funding gaps**, distinguishing between the characteristics of funding schemes and the funding gaps.

	Artists and producers	Artist managers	Presenters and programmers
Better access to financial resources	2	1	1
Better access to the right connections within the performing arts	1	2	
More visibility for my work or programme/the work I represent	3	3	
More time/space for artistic development before presenting/touring	4		
More time/space to connect with local communities			
The need to rethink traditional live presentation formats			3
The need to experiment with digital and/or hybrid presentation formats			2
Options for green transport		4	4
Recovery post-covid			

Table 5: What performing arts professionals need most when it comes to cross-border touring and presentation (scale from 1: most relevant, to 4: least relevant), by professional category

Source: IDEA Consult, based on data from the Perform Europe survey

	Artists and producers	Artist managers	Presenters and programmers
WE	<ol style="list-style-type: none"> To slow down production and presentation models and create more space for artistic development To create more international touring opportunities for artists from my region 	<ol style="list-style-type: none"> To develop more ecological ways of producing, presenting and touring To create more international touring opportunities for artists from my region 	<ol style="list-style-type: none"> To develop more ecological ways of producing, presenting and touring More opportunities to exchange with countries in other regions
NE	<ol style="list-style-type: none"> To create more international touring opportunities for artists from my region To strengthen the performing arts ecosystem in the area 	<ol style="list-style-type: none"> To create more international touring opportunities for artists from my region To strengthen the performing arts ecosystem in the area 	<ol style="list-style-type: none"> To strengthen the performing arts ecosystem in the area To develop more ecological ways of producing, presenting and touring
SE	<ol style="list-style-type: none"> To create more international touring opportunities for artists from my region More opportunities to exchange with countries in other regions 	<ol style="list-style-type: none"> To create more international touring opportunities for artists from my region More opportunities for emerging artists 	<ol style="list-style-type: none"> To create more international touring opportunities for artists from my region To strengthen the performing arts ecosystem in the area/ More opportunities for emerging artists
EE	<ol style="list-style-type: none"> To create more international touring opportunities for artists from my region More opportunities to exchange with countries in other regions 	<ol style="list-style-type: none"> To create more international touring opportunities for artists from my region 	<ol style="list-style-type: none"> More opportunities to exchange with countries in other regions To diversify the international offer in my area

BA	1. To create more international touring opportunities for artists from my region	1. To create more international touring opportunities for artists from my region	Not enough presenters from this region
	2. More opportunities to exchange with countries in other regions		
EP+T	1. To create more international touring opportunities for artists from my region	1. To create more international touring opportunities for artists from my region	Not enough presenters from this region
	2. To diversify the international offer in my area	2. More opportunities to exchange with countries in other regions	

Table 6: Priorities related to cross-border touring, by macro-region and professional category

Source: IDEA Consult, based on data from the Perform Europe survey

Individual/organisational level

Lack of time and space

- Because of increased economic pressures, competition and fragmentation of resources, there is a general need for slower pace for production and presentation. In this accelerated performing arts system, artists and producers lack the possibility to have longer runs in one place and longer runs within one tour.
- The limited lifespan of performances and tours does not allow for shows to further develop and mature after the first shows or first run (artistic value). It is difficult to organise longer tours which would add to the economic sustainability of their endeavours.
- The limited lifespan of performances and tours does not allow for a more elaborate return on investment (economically) or the possibility to engage a diversity of audiences in different places.
- Presenters (venues and festivals) and producers lack time and resources to deepen artistic encounters and engage more profoundly with local audiences, communities, artistic peers.
- Programmers experience an increased difficulty to take artistic risks in programmes, because of decreasing programme budgets. In contexts with less elaborated (international) performing arts policies and funding schemes, presenters rely on the offer from artists working in contexts where there is more support (specific countries in the West and North of Europe).
- In this increasingly competitive field, artists and producers lack the time and space to develop their networks and build capacities, to collect experience and develop relationships. This is especially relevant for emerging artists.
- The fast pace and fragmented touring in the accelerated performing arts ecosystem leads to a distorted work-life balance for artists and art workers involved in touring.

Lack of knowledge and awareness concerning sustainability and inclusivity.

- Research points towards a general lack of awareness, knowledge, experience and resources within the performing arts field about inclusive practices, with regards to disabled artists.
- Similarly, there is a lack of awareness, responsibility and know-how on CO2 reduction and greener practices. By many, CO2 impact is not considered while touring, presenting and producing (including the digital footprint).
- Tools, toolkits and financial incentives are more available in contexts where there is a broader policy interest. Performing arts professionals find it difficult to include ecological considerations in their decision framework because of limited financial resources, sense of isolation, lack of options.
- For many performing arts professionals, translating personal conviction to sustainable practices is challenging because developing a sustainable organisational model heavily relies on prospection and/or touring in a transnational network for (co-)production and presentation.

Lack of access and accessibility

- Most professionals have experienced a lack of connection and isolation due to the Covid-19 constraints. The pandemic measures have impacted the connection between performing artists, art workers, and audiences (closed venues, limited audience capacities, travel restrictions, mandatory 14-day quarantine in many countries, PCR-tests, etc).
- The access and accessibility which disabled artists and audiences lack requires specific attention. Apart from the above-mentioned need to work on the development of knowledge and awareness, there is a need to remove (physical and cultural) barriers for disabled artists to be able to interact and engage with arts institutions in a diversity of contexts.
- In a market characterised by the so-called ‘cost disease’, performing arts professionals experience an unequal access to “the market” depending on the local funding opportunities, policy context, and symbolic capital. Because of a lack of resources, some presenters are limited to selecting work from those specific contexts where there is additional policy support for international touring – leading to current asymmetries in cross-border presentation flows.

Lack of skills and capacities

- Skill gaps (digital skills, entrepreneurial skills, the skills to develop international work, etc.) can be observed on many levels. It is experienced by emerging artists who need to find their way in the (international performing arts field). It is experienced by those artists and producers who experience a lack of professional support and management. It is experienced by many who need to diversify their skills in response to changing professional and societal needs.
- Opportunities for professional capacity building, training and development differ greatly from context to context, leading to more general gaps for professional skills that allow artistic works to develop a more international lifespan.
- The need to enhance the social and ecological values regarding cross-border presentation, needs for the development of other, new skills and competences: not only with regards to artistic and entrepreneurial skills, but also with regards to many forms of social inclusion and environmental sustainability.
- There is a general lack of recognition, lack of interest and curiosity as well as bias and stereotypes on many different and intersecting levels (origin, colour, disabilities, gender, sexuality, etc.). It is often on this underlying level of personal convictions, emotions, and beliefs, that walls are grounded. They are difficult to overcome.

Lack of 'slow' opportunities

- Certain aspects of funding schemes (underfinancing, quantitative measures, focus on visible products) lead to competition and acceleration in the current performing arts ecosystem, making it difficult to bring the different aspects and values of sustainability into practice.
- There is a sense of acceleration and lack of time for development in a competitive system, characterised by hypermobility and a fragmentation of resources. On the human level, this has a negative impact on well-being. It limits the artistic, social and economic potential described above.
- Lack of international artistic offer in certain areas (especially in the situations of 'peripheral' countries and regions) has a negative impact on the diversity of perspectives, cultural references shared with local communities and development opportunities for local performing arts ecosystems.
- The difficulty of intervening in complex system dynamics: how do we work on behaviour change, organisational change, system change towards a more sustainable performing arts touring system?
- The lack of opportunities for artistic development in certain (geographical) contexts leads to forced (cross-border) mobility and brain drain, with artists temporarily or permanently moving to areas with more opportunities for developing international connections.
- In general, the post-Covid survival and recovery needs put a great pressure on the performing arts sector, particularly affecting smaller or independent players and those working on an individual basis.
- Fragmented budgets: certainly, in the last decade, coproduction budgets have generally become more fragmented.

Collective knowledge gaps

- The value of and the right conditions for 'digital' strategies for creation and distribution in a live arts context still need to be explored and understood. There is a lack of knowledge concerning the CO2 impact of international touring practices. We should bring in more data, tools, methods to calculate the carbon footprints within the performing arts sector.

Lack of connection and collaboration

- Respondents lack a CE/EU-wide platform for connections between producers and presenters.
 - Respondents experience a lack of showcasing opportunities on a wider European level physically, but also the need for digital space that functions as a market to communicate the international offer to venues and festivals.
 - Exclusivity as part of contractual negotiations in the context of international presentation is an obstacle for sustainability (longer tours in a region).
 - Many feel there is a lack of sharing of resources, not only financial resources, but also knowledge and networks in a performing arts ecosystem characterised by competition. This is a barrier for emerging artists and companies, and those with less established networks or visibility.
-

Lack of fairness, equality and equity

- Cooperation between all stakeholders in the ecosystem is lacking. There is a power imbalance between artists, programmers and producers and cultural institutions, leading to “unfair practices” such as unequal remuneration, unequal distribution of risks (more on the shoulders of the vulnerable and those working on a project basis). These unfair practices are not only predominant in deprived contexts but paradoxically also in situations with better equipped funding systems. They relate not only to funding gaps, but also to the culture of collaboration, solidarity and sharing of risks in the performing arts field.
- Accessibility to the system must be more balanced, with attention to both emerging and established artists and the disadvantaged position for specific groups: disabled artists, trans and non-binary artists, etc.
- There is a discrepancy between the discourse on ‘inclusivity’, ‘sustainability’ and balance, and the actual lack of diversity in the sector.

Broader societal context**Rights and values gaps**

- Lack of cross-border uniformity on the Status of the Artist and of uniformity regarding income, employment, working conditions, including long term benefits and social security (e.g., pension, insurances, health benefits, etc.)
- In certain political contexts, there is a lack of freedom of speech and cases of censorship.
- The ‘desired state’ section recaps the fundamental belief by the Perform Europe respondents in the intrinsic value of the arts as a driver for societal change. However, they experience difficulties communicating and making the value of the arts and the specificity of arts economies visible in their exchange with those outside of the sector. There is a sense of instrumentalisation and lack of recognition and understanding of the artistic value and its specific contribution to society.

Table 7: General gaps
Source: IDEA Consult

Asymmetries and differences between macro-regions

- The research shows an unequal distribution of funding schemes (in countries and macro-regions), as well as a different situation with regard to their effectiveness, sustainability, and transparency. As explained above, this asymmetry is a crucial factor leading to unequal access to the performing arts ecosystem, an unlevel playing field for professionals in the 41 countries in focus.
- There are issues with inviting performing arts professionals, artists, companies and presenters from countries whose citizens need a visa to enter the Schengen area.
- The need to create a level playing field also relates to policies towards sustainability and inclusion of underserved groups.
- Local, regional and national contexts across Europe are also very different (geographical and socio-economic points of view), and this affects the level of importance/urgency given to the ecological aspect of touring.
- There is a need for rural cultural policies at national level and for support to connect rural areas, both at national level and across Europe.

Lack of perspective for sustainable practice, systemic change, and innovation

- Many of the lacks experienced on the micro-level (individuals) or the meso-level (organisations) relate to tensions on the macro-level of the performing arts sector as a whole, in its broader societal context. Achieving a more sustainable situation for individuals and organisations requires a more fundamental systemic shift, which is part of a broader transition towards more just, fair, sustainable and inclusive working models within the performing arts.
- Exploring this systemic change and transition requires an approach in which there are resources to invest in meaningful experiments and the development of new skills and competencies with regards to more sustainable and inclusive approaches.
- There is also a need to further explore the digital in this context: development of digital skills and digital infrastructure for meaningful digital experiments.
- In all these domains and areas of exploration, there is a need for more artist-led experimentation and innovation, in line with the artistic values put forward in the desired state section.
- In many contexts, current funding schemes lack a long term perspective on many levels: lack of a longer term international performing arts policy vision, a focus on short term ad hoc support rather than a long term perspective on artistic development and lack of understanding concerning the social impact of performing arts practices on a longer term.

Value gaps and lack of recognition

- The need for political recognition of all arts disciplines and of the value of the cross-border dimension of performing arts works distribution.
- Concerning revenue and income from private sources, respondents raise issues of conflict with the social and ecological values essential to the 'desired state'; they stress the need for corporate responsibility.

Characteristics of funding schemes

Lack of incentives for sustainable practices

- Ecological awareness is not structurally embedded or mainstreamed in funding schemes. On a national level, green touring and sustainability in the arts are very recent concepts. No general framework is yet in place to integrate these aspects in the selection and monitoring processes for touring support schemes.
- Similarly, incentives for fair and inclusive practices in funding schemes are overall rare. Co-funding rates are not always feasible for parts of the sector.
- Funding systems and schemes induce competition rather than solidarity.

Lack of flexibility and long term perspective

- There is a lack of long term, structural and sustainable support - there is too much ad-hoc and project-based funding.
 - There is a lack of funding opportunities that focus not only on the circulation of products, but provide time and space for development of international networking within the performing arts in a diversity of local contexts and of deeper connections with audiences and communities.
 - There is a lack of funding opportunities that combine touring and distribution with other formats for exchange, aiming at audience development & community building actions, exchanges with other sectors, which could potentially enhance the many values of cross-border presentation of performing arts: environmental sustainability (longer stays), social value (deepening connections), economic value (diversified sources of revenue).
 - In current funding schemes, the offer is not often demand-led, based on what artists and producers need. Respondents indicate a lack of flexibility and discrepancies between funding schemes' requirements and artistic choices.
 - Lack of valorisation of existing work. The strong focus on the "new" - the need to create new pieces to apply for funding - is an issue since it hinders the valorisation of work already developed.
 - The strong focus on quantitative criteria to evaluate applications is an obstacle for innovation, transition and transformation.
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Consortium partners

Perform Europe is funded by the Creative Europe programme of the European Union and co-managed by a Consortium of 5 organisations:



IETM - International network for contemporary performing arts is one of the oldest and largest international cultural networks, representing the voice of over 530 professionals and organisations working in all the fields of the performing arts in more than 60 countries worldwide, including artistic companies, collectives, organisations, festivals, venues, residencies, producers and independent artists, theatres and dance houses, cultural/research/resource centres, fellow artistic and cultural networks, universities and institutional bodies.



The European Festivals Association (EFA) is a community dedicated to the arts, the artists and the audiences. EFA's main role is to connect festival makers to inform, inspire and enrich the festival landscape in Europe and beyond. In this perspective, EFA is a festivals' service and a knowledge and training provider, developing a WE-story of people and organisations, bridging the distance between festivals and all kinds of stakeholders around festival making.



Circostrada is the European Network for Circus and Street Arts. It was created in 2003 and counts over 120 members coming from more than 35 countries. Its core mission is to further the development, empowerment and recognition of these fields at European and international level. Circostrada supports circus and street arts professionals by implementing a wide-range of capacity building initiatives, boosting professional exchange, gathering information and resources, fostering continuous training, innovation and knowledge-sharing.



EDN - European Dancehouse Network, established as a legal association in 2009, is a network for trust and cooperation between European dancehouses in sharing a common vision regarding the development of dance art across borders. In May 2020, EDN counted 45 members in 26 countries. Its key mission is to cooperate in securing a sustainable future for the dance sector and to improve relevance for diverse dance among society.



IDEA Consult provides independent advice to organisations and governments at all levels: local, intermediate, regional, federal and European. Their “Thinking Ahead” baseline reflects IDEA's unique value proposition: committed professionals involved in society and well connected with research institutions; evidence-based advice: applied research, based on validated techniques; sustainable solutions for actual social challenges.



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