

3

*Mapping the Film  
and Audiovisual  
Sectors: A  
Research Agenda  
for the Future*

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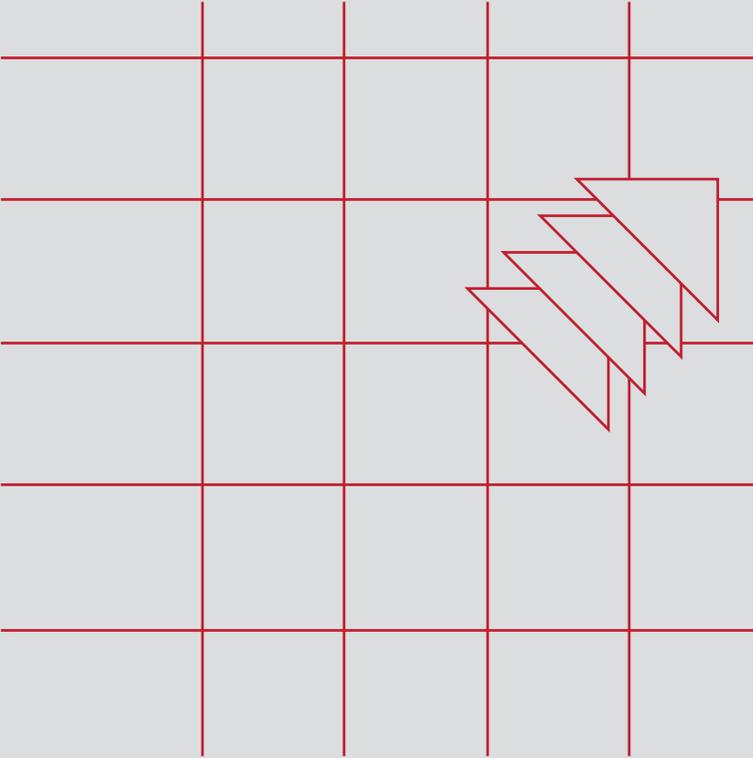
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**ABSTRACT**

The film and audiovisual sectors play a crucial role in the European societies, and by extension, also in Portugal. This paper proposes a conceptual change centered on mapping the film and audiovisual (AV) industries in Portugal as a creative sector instead of a cultural one. We argue that this approach enables a more rigorous measurement of the value of these industries in the creative economy, besides allowing for more accessible connections between the creative industries and other areas. This conceptual change is based on an innovative approach to the “creative trident.”

We argue that the value of the film and AV sector must be rooted in a flourishing creative workforce, and we propose that entrepreneurship education can be a path forward in unlocking the sector’s tremendous creative potential. We suggest an innovative research agenda to link all these elements in the context of the audiovisual and film creative industries.

**KEYWORDS:** mapping studies; creative industries; cultural industries; creative professions; creative trident; entrepreneurial education; creative workforce; creative skills



## INTRODUCTION

Mapping the value of cultural and creative industries (CCI) is a complex and challenging task. For instance, in Horizon Europe, the new European framework funding from 2021 to 2027, acknowledged that “Markets in this sector [CCI] are heterogeneous and there is no comprehensive mapping at EU level” (European Commission, 2021, p. 45). In this paper, we engage in that complex task, and for that, we propose the design of an innovative research agenda targeting the mapping study of the film and audiovisual (AV) sector in Portugal. We consider the definition of this agenda crucial if we want to develop mapping exercises that can result in suggestions for policymakers and funding bodies that include provisions for a long-term monitoring and evaluation schema. This, in association with fixed funding schemes, can help the country in overcoming, in the case of cinema, its historical divorce from local audiences and the inability to develop sustainable production modes (Graça, 2021). Furthermore, in the case of audiovisual, its inability to move from a massive low-quality production system, supported solely by local champions, to a high-end one (Damásio & Costa, 2020). Our work addresses the following research question: how to map these sectors in order to identify the factors that increase the value they produce? That is to say, what does the economic, cultural, and social roles of the several activities film and the audiovisual sectors promote, and how can we unlock their creative, social, cultural, and economic value?

We argue that previous mapping methodologies do not fully capture the value of the film and AV sector, that cinema and AV industries have not been mapped with adequate classificatory systems because those were based on concepts that do address all the features marking these industries. Therefore, we propose an innovative mapping study that is best suited for this task. Having this said, we propose that in order to understand the full value of the film and AV industry, it must be mapped as a part of the creative industries and related to the broader development of a creative economy. This also implies identifying those elements that can help unlocking the potential of this industry. We postulate that entrepreneurship skills and an entrepreneurial mindset are key at this level due to the fragmented nature of the European audiovisual space and the positioning of many countries (i.e., Portugal) as small peripheral markets (Lobato, 2020).

The concept of an European audiovisual space became part of the European discourse in the mid-1980s when the primary goal of the European community was to create an economic area without internal borders, in which people, goods, services, and capital could move freely. This area is defined by the limits of the European Union, whose borders are, of course, not fixed but are constantly expanding through the integration of new member states. The European

audiovisual space is then the product of two factors: first, it is contained by the external border set by the common regulatory framework, and second, it is the sum of the constituent national audiovisual spaces. The European motto 'Unity in diversity' is thus perfectly suited to the audiovisual case (Micova, 2017).

At the same time, the global reach of online platforms and services and the globally synchronised flows of audiovisual content might suggest that the global media market is now fully integrated. Nevertheless, the global digital market is far from united, for national borders, center-periphery hierarchies and differences in scale still matter, and perhaps they matter even more than in the analog broadcast era. Indeed, suppose we live in the era of "post-globalisation" (Flew, 2018), when its defining features include consumers' continuing gravitation towards local content as well as national governments' continuing primacy in the supranational regulation of multinational media corporations and the Internet in general (Michalis, 2016). This led us to assume that the digitalisation and globalisation of the audiovisual distribution we are witnessing takes place through the work of negotiating borders, peripheral positions, differences in scale, and cultural distances. This is a process that calls for mapping approaches that both respect these borders, but also help in understanding what the process entails, in particular, on the creative side (i.e., circulation; innovative use of technology; exploitation of local heritage and so forth).

Our proposal to map this industry as a creative endeavor intends to avoid the typical reduction of this industry to a cultural sector (Cruz et al., 2019; Garnham, 2005; Mateus, 2013), a mapping category that is an obstacle to identify the increasing creative character of this industry and its specific economic and societal contributions. To confine the film and AV sector to a cultural industry is to confine it to a traditional socioeconomic analysis, which restricts it to entertainment with limited artistic value. Such a reductionist view also prevents us from mapping the spillover effects the audiovisual and film sectors nowadays have upon many other economic sectors, such as tourism or healthcare (Durmaz et al., 2010; Dzhandzhugazova et al., 2016; Mandić et al., 2017; Pagan et al., 2009), and the myriad of ways in which they are reshaping themselves under the influence of different factors such as multiple technological innovations or the emergence of new business models.

We claim that mapping the film and AV sectors can provide valuable lessons for the mapping of other CCI sectors. The film and AV sector is particularly well suited as a case study to think about all the other CCIs, due to the technological, digital, and legal changes that this sector has undergone, which have impacted the way audiovisual content is produced, distributed, and consumed. The implementation at the national level of the 2019 version of the AVMSD – Audiovisual Media Services Directive, currently taking place, and innovations

such as AR or XR are examples of the forces presently reshaping these sectors. Moreover, the pandemic has also hit the film and AV sector, with a loss of 22% of its turnover, from 2019 to 2020 (EY, 2021, p. 6), and a drop of revenues generated by European cinemas estimated at -75% in 2020 (EY, 2021, p. 7), with consequences to its workforce.

In this paper, we present our definition – still in progress – of creative industries, situating it in the broader debate on the Cultural and Creative Industries' definition, and positioning the film and AV sector within the creative economy, arguing so to recognise the value of its workforce. We then propose our innovative mapping study of the film and AV sectors, based on an innovative approach to the “creative trident” methodology. Afterwards, we explain the relevance of our industry and policy-oriented research proposal to the film and AV sectors in Portugal. We aim to show the value of the creative workforce because it is a skilled and diverse creative workforce that can build a sustainable creative economy. Hence, we propose that to build a more resilient creative workforce, we need to build entrepreneurship education in HEI. Finally, we present some concluding remarks which summarise our research proposal and draw its implications.

### **CONCEPTUALISING THE FILM AND AUDIOVISUAL SECTORS WITHIN THE CREATIVE ECONOMY**

Multiple definitions of the creative economy have developed over the past decades that contribute to further understanding the knowledge-based economic activities upon which the creative industries are based (Flew & Cunningham, 2010; Greffe, 2016). Most of these focus on the role creativity plays in contemporary economic life, stating that economic and cultural development are not separated but can be a part of a more extensive development process (Cunningham & Flew, 2019).

The concept of a creative economy remains a source of debate. Indeed, what should be included in this notion, and what activities, products, and occupations should be excluded? Undeniably, the development of the creative economy indicators is intimately linked to the answers given to these questions. Over the years, many organisations, from the UN to the OECD, from the UNESCO to the EU, have contributed to the debate; along with a prolix field of “expert-consultants”, policy consultation, and think tank work, has contributed for the emergence of competing, sometimes conflicting, views (Casey & O'Brien, 2020, p. 445; Roy-Valex, 2010).

At the center of the so-called creative economy lies another key notion – that of the creative industries. Creative industries are those “which have their origin in individual creativity, skill and talent and which have a potential for wealth

and job creation through the generation and exploitation of intellectual property” (DCMS, 2001, p. 4). This working definition of CI was proposed initially in 1998 by the DCMS, UK’s Department for Culture, Media and Sport (DCMS), and it is still in current use nowadays (Cunningham & Flew, 2019).

There is sometimes a considerable overlap between the concepts of “creative industries” and “cultural industries”, and it is not rare to find these terms used almost interchangeably (Doyle, 2017). In fact, the concept of “cultural and creative industries” is the subject of extensive debate, across several disciplines, from cultural studies to economics, sociology, cultural policy studies, and CCI research (Campbell, 2019; Comunian & Ooi, 2016; Hesmondhalgh, 2018; McRobbie, 2016; Oakley & O’Connor, 2019).

We chose the term “creative” over “cultural” economy following authors’ claim that the term “creative industries” retains the association between these industries and the information society. Hence, the general idea of a creative economy is more extensive than that of creative industries, even more so for cultural industries (Garnham, 2005, 2015). This is particularly relevant in a digital economy and society. Creative economy and digital economy are increasingly interlinked (UNCTAD, 2018). A significant change in the practices, organisations, and relations in the CCI was brought by the Internet and the rise of digital communications technologies. The CCI contributes to creating technology and content-based innovation, usually its early adopters, testers, and drivers, as it has spillover and cross-sectoral effects (NEM, 2020). Content and technology innovations thus serve as key factors in the film and audiovisual sector (Salvador et al., 2019).

Following Galloway & Dunlop (2007), we argue that the emergence of creative industries has the primary effect of inscribing the field of the cultural economy in a more extensive economy, whether a knowledge one, an information one or an immaterial one. In other words, the emergence and development of creative industries propels the whole creative economy (Cooke & Lazzaretti, 2008; Florida, 2002).

Hence, we propose that this conceptual change in mapping cinema and audiovisual industries as a creative sector, instead of a cultural one, enables a more rigorous measurement of the impact of these industries in the creative economy (Artero et al., 2019). At the same time, this definition also gives way to analyse which elements can unlock creativity in these industries and consequently reinforce their status. We propose entrepreneurship as one of these key elements.

Past studies were mainly focused on a quantitative dimension of the creative economy, defining these industries based on their contribution in terms of GDP or total revenues (Puchta et al., 2010). Our proposal departs from those merely economic-oriented studies, which do not account for the complexity and the multiple challenges of the creative economy; namely, precariat on the workers’

side, and lack of scale on the side of companies, being two of the most prominent ones (Brook et al., 2020; Deuze & Witschge, 2020; Doyle, 2017).

In dialogue with the field of production studies in film and AV (M. J. Banks et al., 2016; Caldwell, 2008), and based on our previous work on television production (Damásio & Costa, 2020), our proposal includes the analysis of the different individual and collective actors (workers and companies) that mold the structure of the film and AV industry. This dimension enables us to capture how the industry workplace's practices and ideologies, and the working conditions of creative workers affect the film value chain itself. This dimension is also crucial in relation to the topic of entrepreneurship. Entrepreneurship can only occur if proper conditions are met. If, on the side of the workers, these industries depict conditions – i.e., precariousness – that diminish the workers' involvement and engagement, then the industry has a problem in unlocking all its creative potential and increasing the value it generates.

Our research proposal focuses on both the structures of production and the practices they entail; pointing to the continuity between media analysis and institutional practices, and the extent to which self-reflexivity of the actors involved in production has for the moulding of the production culture they are a part of (M. J. Banks et al., 2016; Caldwell, 2008; Couldry, 2004; Postema & Deuze, 2020).

Given the forms of access and working conditions of people in the CCI sector, creative work is characterised by informality and precariousness (freelance, project-based work, low pay and long hours), accompanied by a rhetoric of passion and love for the job (M. Banks, 2018; Lee, 2018; Oakley & Ward, 2018). These characteristics of the CCI sector disadvantage women and minorities over their male counterparts, and hence women and minorities are underrepresented, misrepresented, underpaid or ghettoised in lower-paid and less creative positions in the CCI, and particularly in the cinema and audiovisual industry, with Portugal being no exception (Eurimages, 2020; Gomes et al., 2006; Hesmondhalgh & Baker, 2015). The #MeToo movement brought to the daylight some of the inequalities that impact the well-being of the creative workforce in the film and AV industries (Brannon Donoghue, 2020). Finally, the COVID-19 pandemic exacerbated the existing precarious conditions of creative workers.

Hence, our research proposal captures the total value of the creative workforce and organisations upon which the creative economy rests. As such, our research agenda is innovative in its approach to the creative workforce as it bridges the gap between cultural and media economy and cultural studies (Bridgstock et al., 2015; Flew, 2019a; Garnham, 2015). Moreover, it addresses a gap in the literature (Caldwell, 2008; Couldry, 2004; Ortner, 2013), since previous studies have tended to focus only on the audience or the reception side.

## **AN INNOVATIVE APPROACH TO MAPPING THE FILM AND AUDIOVISUAL SECTORS**

Our research agenda intends to develop the mapping of the cinema and the audiovisual sector in creative industries and its role in shaping national or local creative economies. This innovative mapping of the film and audiovisual industry will answer several questions that research and policymaking in this domain entail: 1. Can we compare the role innovation and technology have in the cinema and audiovisual industry with the role these might have in the rest of the creative economy?; 2. Can the transformations these media systems are going through be generalised for the overall creative sector?; 3. How does a conceptual change in mapping cinema and audiovisual industries as a creative sector, instead of as a cultural one, enables a more rigorous measurement of the impact of these industries in the creative economy?; 4. How do the working conditions of creative workers affect the film value chain?; 5. What are the motivational drivers, attitudes and perceptions of stakeholders in the areas of Film and Media Arts, namely professionals in the fields of film and media production?; 6. What motivates and encourages production companies and filmmakers to embark on film and moving visual media production?; 7. Lastly, what role does technological transformation play in new production, shooting, post-production and distribution?

Our research agenda builds on previous international literature on mapping studies, and recommends several methodological innovations via the combination of quantitative and qualitative methods, suggesting a mixed-methods approach that enables triangulation (Creswell & Clark, 2007). It is also innovative in the way it combines secondary and primary data. This research agenda is set up to allow for a complex and multidimensional understanding of the creative industries and the creative workforce as well as to enable a comparative analysis between international creative industries.

Hence, we build upon the Creative Trident approach (Higgs & Cunningham, 2008), which is to engage in the new paradigm of the creative economy in the cinema and audiovisual industries. The Creative Trident approach (Higgs & Cunningham, 2008) allows to identify and measure the impact of the creative workers not only in the creative industries (as it is usually measured), but also in the non-creative industries. Artists and other creative professionals often have jobs in industries that are not classified as “creative industries”, and therefore the value of their creativity is missed out (Towse, 2010). The fact that there are creative workers employed in non-creative industries is evidence of the culturalization of services and goods, as these workers’ jobs have been subjected to the culturalization effect.

The Creative Trident is based on three iterations. The first iteration focuses on the employment and business activities within the selected industrial classifications (Higgs & Cunningham, 2008, pp. 9-12), which has some limitations: it is based on industry codes alone (e.g., NACE – the Statistical classification of economic activities in the European Community), excluding non-creative staff (e.g.: support and management staff) working within creative firms, which compose a large percentage of its workforce. The second iteration aims to address these limitations and includes industry and occupational data (Higgs & Cunningham, 2008, pp.12-15). The third iteration (Higgs and Cunningham, 2008, pp. 14-22), equated with the creative trident itself, defines three occupational situations of the creative workforce: 1) the specialists working in the creative industries (specialists or creatives); 2) the support staff (non-specialists) working in those same creative industries (support staff); and 3) the creatives who are “embedded” in other industries, which are not necessarily creative (embedded creatives). The strength of the creative trident approach is to show the amount of creative workforce working beyond creative industries, in other firms and organisations, and hence, identify the value-added of creative workers to other non-creative industries and sub-sectors of creative industries.

The creative trident mapping is operationalised through statistical analysis of secondary data in official databases on industry and occupations. However, given the characteristics of the creative workforce laid out above (precariousness brought by freelance work, or multiple job-holding), we might say that official statistics do not capture the full picture of the creative workforce (Alper & Wassall, 2006), neither do they capture the standpoint of individual and collective actors that mold the industry practices. Our research agenda suggests an innovative approach to the creative trident, by capturing this dimension through qualitative methods, such as interviews with creative workers, as well as an ethnographic study of a cinema or audiovisual production setting. The qualitative dimension is aligned with the previous ethnographic approaches to production practices and spaces, and producer identities, in the film and audiovisual sector (Caldwell, 2008; Hesmondhalgh & Baker, 2015; Ortner, 2013). This approach will allow us to describe and problematise the new boundaries between producers, distributors, and consumers of audiovisual goods, brought about by both the digital turn in film and networked cultures (Kennedy, 2016), but also to identify the key role entrepreneurship plays in this context. Another aspect that can only be clarified through primary qualitative data collection, with the individual and collective actors involved in the film and AV sector, is the one regarding the skills of the creative workforce, as we aim to understand the required skills, knowledge, and competences of the creative workforce. We aim at identifying these skills from the perspective of the workers themselves, and from that of

the industry's stakeholders. What are the most important skills, and which of them are lacking?

To retain the specificity of the film and audiovisual industry while evaluating the creative economy, our proposal also includes the analysis of content production in the film and audiovisual sector. By including the creative output of this sector, we retain its specific cultural dimension, namely in Europe, for its aesthetic value (Crusafon, 2015).

We've designed our industry and policy-oriented research proposal agenda in five steps, in order to address our research questions:

First, map the film and AV sector through the "traditional" creative trident approach, by defining indicators and instruments to collect data. Map the size, density, and diversity of creative activity, as well as its creative output, towards an understanding of the cinema and the audiovisual sector as constituting the Creative Industry. We propose this method to include measures in data sources frequently used in mapping studies like population surveys (censuses) on people's employment in the industry, and/or surveys on businesses within industries (labour force surveys).

Second, in order to map the cinema and audiovisual industry output, we propose a comprehensive analysis of the artistic audiovisual production conducted in a certain period in order to identify: a) themes; b) genres; c) 360-degree strategy / cross-platform level; d) partnership/collaboration level (co-production, number of production companies); e) volume and type of funding; f) team size; g) awards; h) audience figures; and i) cinema festivals.

Such analysis will identify and place along a value chain the different activities and actors comprised in the areas of cinema and audiovisual production, and distribution in any country. It should encompass all genres and audiovisual production with a focus on fiction. These steps should provide a rich understanding of what the cinema and audiovisual sector looks like, from the perspective of the networks formed by the people who participate in it and the resulting output of their work. Furthermore, these research steps will allow for an analysis of existing cooperation and synergy deficiencies along with and outside the film value chain, within the cultural and creative industries, and neighbouring services. We expect to emphasise opportunities and constraints which emerge as a result of ongoing processes of reshaping the CCI and the audiovisual sector. Placing cinema and the audiovisual sector within the CI has proven central to the search for classificatory systems.

Third, a qualitative approach must be included in the creative workforce and the creative organisational cultures of production. This implies qualitative research gets conducted, for instance, via in-depth interviews with creative workers and industry stakeholders. We also postulate this should be complemented with ethnographic

research that compares with statistical data coming from the first and second steps. An ethnographic study at a cinema or audiovisual production setting enables capturing the lived experience of workers over a sustained period and observe organisational aspects of the industry sector that are not entirely captured through discourse, in the shorter interview time. The primary qualitative data collected should evaluate motivational drivers, attitudes, and perceptions of stakeholders in the areas of Film and Audiovisual, with special attention to questions of technology uses and adoption; identify what motivates and encourages production companies and filmmakers to embark on film and moving visual media production; study what role technological transformation plays in new approaches to production, shooting, post-production and distribution; and identify and address the gaps between the skills taught at film schools and the market needs.

Very few examples exist of research that do this, while many exist of country or region-based quantitative analysis (Cucco, 2018), the specific role entrepreneurship plays in this context has not yet been studied.

The last stage of our agenda deals with impact evaluation. Only an industry and policy-oriented research agenda is well placed to account for the relevance and value of research beyond the walls of academia. It must rely on the active participation of and communication strategies the individual and collective actors have identified within the “creative trident” analysis. Moreover, an industry and policy-oriented research agenda needs to target the key players and stakeholders in the (digital) film and audiovisual landscape at the national, European and transnational level (eg.: academia, industry, policymakers, creative workers, professional associations, civil society, state agencies, government services, media, theatres, museums, galleries, and teachers).

### **TOWARDS A CREATIVE ECONOMY OF FILM AND AUDIOVISUAL SECTORS: PORTUGAL AS A CASE STUDY**

The film and audiovisual sector play a key role in European society (Crusafon, 2015), and Portugal is no exception (Graça, 2021). Therefore, in this sector, we will resort to the Portuguese example to highlight the benefits of the proposed methodology. Significant technological, economic, cultural and legal changes in the cinema and audiovisual sectors have taken place in the last decade. The cinema and audiovisual sectors have always been a technology-oriented industry (Salvador et al., 2019). Nowadays, the rapid digital and technological change that the sector is undergoing at the production, distribution, exhibition, and consumption levels (from shooting to post-production, 3D effects, VoD), signal the role digital transformations have had in reshaping the creative industries and their societal role.

In Europe, projects are increasingly co-produced at international and inter-continental levels, often co-funded by national, multilateral and/or private funding (Finney, 2010; Fontaine & Pumares, 2019). This network must be managed and made to focus on delivering specific commitments and activities. There is no guarantee that any value will be extracted from work and ideas. Some players are socially motivated; others are economically driven. Individual initiative in the creative media industries, in particular film, fluctuates between authorial aspirations, employability, and uncertainty (Damásio & Bicacro, 2017; Ortner, 2013). Nevertheless, the collaborative aspects of shooting a film are today becoming clearer (Hesmondhalgh & Baker, 2015).

The rapid digitalisation of all aspects of the value chain, and the introduction of a vast number of technical innovations have completely redefined the competencies required for the field. This sector's workers need adequate knowledge and skills, including digital, technological and entrepreneurial skills (Damásio & Bicacro, 2017). There is undergoing research on these technological transformations (at the production, shooting, post-production and distribution level), and an awareness of skills in shortage in the film and AV sector (Duthie, 2021; Van Raalte et al., 2021). A recent report points to the fact that precarious working conditions and informal and unprofessional recruitment practices negatively impact professional development and upskilling by creative professionals, such as freelancers (Van Raalte, Wallis, & Pekalski, 2021, p. 8). However, we know little about the actual motivations and practices regarding technology adoption and its use by stakeholders in the areas of Film and Media Arts, such as professionals and companies in the fields of film and media production.

The fragile and uncertain digital media value chain, the current unstable industrial environment, and digital distribution impact are the main challenges to the cinema and audiovisual sector (Damásio & Bicacro, 2019). Another factor reshaping the political economy of the television landscape in Europe is the European Audiovisual Media Services Directive (AVMSD), which aims at regulating technological developments in the EU sector (Damásio, 2019b). In 2019, the new version of the AVMSD was approved, with all EU countries having to transcribe it to the level of local legislation.

The widespread 'culturalization' of activities, as cultural ideas and moving images become a part of non-cultural products and services (the servitisation of products), increasingly turns film-related labour into content provision that reinforces the role of creativity in a society. The pandemic offered another good example of the culturalization of activities, with audiovisual content being produced to promote healthy communication and literacy about the coronavirus. Therefore, the pandemic also brought to the spotlight the (fully proven) importance of film and audiovisual content as a medium for edutainment (educational

entertainment), well-being, science communication, and a source of health and safety information (Moore et al., 2011; Tietge, 2018).

Nowadays, the film and AV sectors undergo a transformative dynamic, both on the production and distribution sides, concerning these media abilities to progressively offer a richer and more tailored experience. This transformative dynamic that cinema and audiovisual entail, nowadays, can offer a case study to think about the other creative industries.

The international flow of media content, and the rise of global media conglomerates (e.g., GAFAN – Google, Amazon, Facebook, Apple, Netflix), help to explain that the most dynamic broadcasting and TV production companies operating today in Europe have, in most cases, a transnational outlook (Artero et al., 2019; Keinonen, 2018). At the same time, glocalised markets are characterised by disintermediation and re-intermediating processes (Hirsch & Gruber, 2013; Keinonen, 2018).

In this context, Portugal is an interesting case study. Unlike other European countries, the ownership of production companies by international conglomerates in Portugal is not the norm, as our previous research showed (Damásio & Costa, 2020). This does not mean that the global players and flows do not shape national cinema and audiovisual production. Hence, our research agenda proposes an empirical analysis of the intersections of local and national production contexts with the European cultures of production, and global organisations' transnational programs and formats.

The European audiovisual production and funding landscape is still concentrated in a small number of countries, in particular, when it comes to “high-end” content; and the circulation of films and series coming from small countries or peripheral regions like the South of Europe is still very limited (Correia, & Martins, 2007; Fontaine & Pumares, 2019).

In this context, mapping the Portuguese cinema and the audiovisual sector could be an essential step towards a comparative understanding of the European cinema and audiovisual landscape, keeping the focus on the singularities and growth potential of this Southern Europe country, as well as ensuring that film and audiovisual content is diverse and plural. Further, it is also a necessary step to ensure that the content is distributed. This must be the cornerstone for a diverse and plural Europe, resilient to contemporary societal challenges (such as polarisation).

In Portugal, the literature on CCI is scarce. The Ministry of Culture commissioned the first strategic document towards mapping the Portuguese Cultural and Creative sector in 2008. This macroeconomic study was published in 2010 (Mateus, 2010) and is still a national reference. Despite its valuable efforts in showing the contribution of CCI to the economy, it is based on standard industrial

classifications, which have limited power in showing CCI contributions. Also, the data presented in the report refers mainly to the pre-austerity period.

In the last few years, Portuguese audiovisual production has gone through significant technological, economic and cultural changes (Damásio & Costa, 2020). In the context of the transformation of distribution platforms, brought about by the digital turn, and despite the decrease in funding on a national level and irregularities in distribution of public funding for the arts in general and the audiovisual context in particular, Portuguese cinema has seen a rise of qualified, semi/professionalised production of audiovisual content by a new generation of production companies, filmmakers and creatives (European Audiovisual Observatory, 2018).

In Portugal, the pandemic effects exacerbated the precariousness brought about by the recent austerity period. 2012 was dubbed as the “year zero” for the Portuguese cinema and audiovisual sectors, due to severe financial cuts, no productions were carried out in that year. However, in Portugal there is a gap in the study of the creative workforce. On the one hand, literature on precarious work in Portugal has not included creative workers in the aftermath of the austerity crisis (Carmo & Matias, 2019). On the other hand, literature on work in Portuguese cinema during the crisis has focused on cinema itself, as well as its auteurs, including women film directors (Liz, 2018; Liz & Owen, 2020), but leaving understudied the gendered cultures of production of the cinema and the audiovisual sector. In fact, our research will look at the production and the workers’ side of the equation differently from most of the literature, not at the audiences and their reception processes. Hence, our proposal aims to address these two main gaps in literature. In Portugal, the pandemic seriously hit the film and AV sector (Leão, 2020). The creation of the “Audiovisual Union” [União Audiovisual], an informal group that supported workers and their families throughout the pandemic, is an example of a grass-roots civil society initiative against the failure of cultural policies that support its workforce (Lusa, 2020).

Our proposal advocates that it is necessary to identify, with a bottom-up, systematic approach, the drivers and motives for the rise in quantity and quality of national film production in such a challenging and hostile context (austerity and pandemic), with a special focus on the impact of technological change in the redefinition of audiovisual sectors and the production cultures that underpin them, and how these changes will unfold under the auspices of the AVMSD. The proposed methodology could do this, and support needed policy-making changes.

## **ENTREPRENEURIAL EDUCATION AS A DRIVER OF THE CREATIVE INDUSTRIES**

In this last section, we aim to focus on the particular dimension that is entrepreneurship, which is an example of how results obtained via our proposed methodology could reshape a creative industry and the related educational domains. There is an increase in the number of creative industries courses being offered at HEI; while in the UK and Australia, for instance, they are not as linked as they should be with industry and government needs for the sector (Flew, 2019b). In the film and AV industry, there is currently a shortage of skills and a trend towards upskilling and reskilling the creative workforce. In Film and Media Arts Schools, the primary aim has been educating authors–writers, directors, and/or producers. These three sides of the so-called “Creative Triangle” system suggest that film and media education should focus on the triangle of specialisations and improve upon that understanding (Damásio, 2019a).

This is particularly relevant when efforts are currently being conducted to redefine the competencies and skills graduates in these areas must have in a digital economy and society, in tandem with industry and market needs. We propose that entrepreneurship education in Higher Education Institutions of film and Audiovisual can be a path forward in building a skilled creative workforce, in addition to other voices which claim for better management training and workplace practices (Van Raalte et al., 2021), as well as more effective cultural policies (Belfiore, 2018).

The fact “creativity” is placed as one of the key building blocks of entrepreneurship by contemporary models, such as *EntreComp* (Bacigalupo et al., 2016) that frame entrepreneurship as a transversal key competence applicable by individuals and groups, including existing organisations, across all spheres of life, is not at odds with this assumption. *EntreComp* places creativity as one of the competencies within the key area of “Ideas and opportunities”. A large bulk of the education of students in this area specifically deals with these types of competencies, and we propose that linking entrepreneurship education with training through practice-based projects in development is the best approach, if we want to engage these students with actual production practices (A. Clews & Clews, 2011).

A significant consequence of entrepreneurship education for teachers and students in Film and Media Arts Schools will be bridging the distance between their schools, and the context of the application of the knowledge and skills they provide. For students, this will mean better employability opportunities and more vital transversal skills (Ashton, 2015). For teachers, it will mean an opportunity to implement new methods and pedagogies that better adhere to

the paradigms of literacy and audience construction. In both cases, it will make them more aware of the role that business ventures play in shaping the area and the opportunities that arise as a result. This is crucial in a sector that has had to adapt simultaneously to both the digital environment and a new economic context, leading in most cases to entirely new modes of management and business models (see “Trends and skills in the European Audiovisual and live performance sectors” CSE Report, 2016).

Entrepreneurship education provides a body of knowledge that will enhance students’ creative potential by giving them an understanding of the business environment (Blauth et al., 2014); Müller et al., 20013) along with the provision of better tools for project-based work and self-employment, two realities that have always been present in this sector.

Entrepreneurship education can help film schools’ graduates to better face the challenges brought about by the changes in professional and craft identities, as a result of technological specialisation led by freelancers – a de-professionalisation tendency, particularly important for directors – in the context of a greater number of low-budget projects (Christopherson, 2008). At the same time, entrepreneurship education can also help academia adapt its competencies to changes in the value chain (Hsu, 2006).

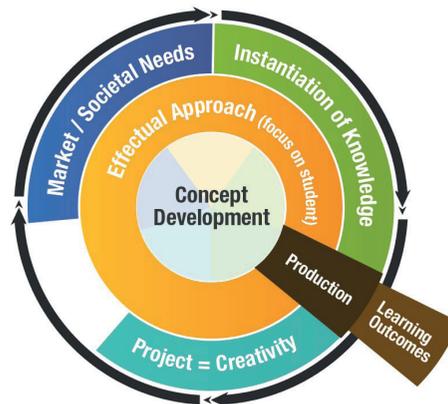
Past initiatives, such as the EntreComp initiative, developed the “Three competence areas of entrepreneurship teaching” typology—‘Ideas and opportunities’, ‘Resources’ and ‘Into action’ (Bacigalupo et al., 2016; Matricano, 2014). These three areas should be regarded as relevant entrepreneurship traits that are interrelated in the context of specific projects. Considering this, our proposal advocates a model that integrates all these three stages and postulates that:

- Creativity and innovation are essential in creative industries and should be taught so that students may have the expertise to choose the best ideas that can be implemented to facilitate innovation.
- Entrepreneurship education should be integrated into film degrees as a separate subject, bound to projects being developed by all elements of the creative triangle, with the objective to promote the acquisition of an entrepreneurial mind-set and entrepreneurship-related skills. In terms of skills, the entrepreneur must know management, whether in operations, human resources, or the financial component. Knowing the economic aspect of the project is vital. It should be noted that the management should influence the implementation of projects, which for many entrepreneurs in the creative industries is unknown and neglected. The entrepreneurs must also have leadership skills to manage people and be able to lead them to collaborate and cooperate in the development of projects.

- Entrepreneurship education should be developed bearing in mind the cultural reality in which the future creative practitioner will work, with content fostering entrepreneurial creativity, whether at their place of work or in the projects they may develop on their own.

The fact that students seem to lack an entrepreneurial attitude is a core challenge for educators in this area. In order to support such an approach, we propose a circular model that follows a renowned, effective approach (Sarasvathy, 2008). Instead of proposing a process approach, for instance to business plan development, it begins with and focuses on students' real settings and conditions, in order to inculcate and hone an entrepreneurial attitude. We consider this approach to best suit film and media education, as well as project development and knowledge instantiation approaches, previously cited.. A circular approach also emulates the current state of the art for the film business value chain (McDowell, 2015). This model focuses on developing learner's entrepreneurial capacities, being the core element of entrepreneurial education (figure 1).

Figure 1 – Circular model: Entrepreneurship education for film and media



Although the relation between entrepreneurial competencies, individual initiative, and self-efficacy has been evaluated, in earlier studies, in the context of management, marketing and creative media, namely at lower levels of education (Comissão Europeia/EACEA/Eurydice, 2016; European Commission/EACEA/Eurydice, 2012; Matricano, 2014; Hills et al. 2008), the context of film at Higher Education remains relatively unexplored.

At the same time, structural and infrastructural factors impede effective dialogue between academics and the creative industry. Collaborations between the creative industries and art and media departments are likely to be an important

aspect of entrepreneurship education. Developing entrepreneurial education in creative subjects without proper integration with other academic activities will probably lead to failure. The proposed circular model intends to address both these problems by placing the project (i.e., short-fiction final course projects) at the centre of the process, and by placing the student-centred approach as its primary supporting element. Implementing work-based learning and training through a project in development methodologies is clearly the best means to support entrepreneurship education. At the same time, a significant share of creative industry professionals favours apprenticeship models to assist students in developing their employability and occupational skills. This symbiosis between the pedagogical side and the learning environment is addressed in our model via both effectual learning and instantiation of knowledge.

Finally, the circular model and the overall description of the proposal put forward integrates but the pedagogical and the curriculum sides of the educational process, a fact we considered to be crucial for the discussion of any new educational proposal in the context of film, and in particular, directors' education.

The implementation of entrepreneurship education in the area of film and media arts, and more broadly in all academic areas associated with the creative industries, should have a substantial impact in the institutions of higher education. Our discussion has attempted to highlight how this will bring HEI activities closer to the stakeholders with whom they work and assure a greater legitimization of their educational model as well as the outcomes it delivers. It should also foster a better adaptation of pedagogical models to current social, economic and technological circumstances, in order to sustain employability and societal relevance.

Research in the area of the creative arts (D. Clews, 2007; Mietzner & Kamprath, 2013) has already emphasised the importance of intermingling occupational and practitioner-like training with equally relevant knowledge and competencies for the market, as negotiation, funding and financial skills. This agrees with the previous focus on the intersection between professional, methodological and personal-social competencies which serve as the core argument in entrepreneurship education in creative arts (Mietzner & Kamprath, 2013). Our proposal embraces this concept whilst steering clear of narrow specialisations. Therefore, we understand, along with other authors (Bacigalupo et al., 2016), that entrepreneurship for the creative industries should be regarded as a multidimensional competence. This approach intends to promote the ability to transform ideas and opportunities into action by mobilising resources, which is precisely what our model indicates via its circular flow of learning grounded on project development. Such an approach is highly relevant for both producers and directors' education.

Film and media art schools have always been differentiated, in what concerns a more general higher education development, policies and pedagogical approaches. They have, since their inception, converged upon a learner-centred and practice-based learning, with a strong focus on training, through projects in development as a key driver of their activities. Our proposal implies that the integration of entrepreneurship education into film and media arts schools is aligned with the distinctive pedagogies and forms of evaluation these schools offer. It represents an opportunity for them to divert from excessive specialism and a narrow focus on market-oriented vocational education, in search of more innovative educational models which successfully integrate practical instruction with critical thinking. This would also allow for the needed upskill and reskill the industry apparently needs, but only a mapping exercise like the one we proposed can confirm it.

## **CONCLUSIONS**

In this paper, we have proposed a research agenda for the film and audiovisual sectors which maps these sectors as “creative ones” over “cultural” in order to identify the elements defining how these sectors evolve and define themselves.

This innovative mapping study we propose combines a mapping anchored in a general broadening of the sectoral perimeter—traditionally devoted to the cinema in the realm of culture—with a classificatory mapping of the cinema and audiovisual as a creative industry within the creative economy. It also includes an analysis of the creative output and related production milieu.

Our industry and policy-oriented research agenda aims to facilitate the production of evidence-based policy, both at the national, European and international levels. At the national level, the mapping of primary and secondary data should allow for a comprehensive and critical understanding of the geographical and spatial dimensions of film and audiovisual creation, production and distribution networks within the Creative Trident. It promotes fruitful comparisons with the film and audiovisual sectors in other countries at the European and international level.

The mapping process is a starting point for understanding the link between these artistic and cultural practices and positive impacts in employment growth, social inclusion, diversity, and education. It is also a way forward to understanding how these sociocultural benefits—along with the positive economic impacts identified—impact national policies and foster a creative economy.

We resorted to the example of Portugal to highlight how the mapping exercise could help policy makers in a specific national context, and then looked at the example of entrepreneurship education for film and audiovisual to illustrate how

outcomes from a mapping exercise can help to reshape activities related with the industry, in this case, educational activities. These two examples highlight the innovative features of our adoption of the creative trident model, which includes the analysis of specific creative outputs of an industry in order to determine its value production structure while emphasising the central role of its workforce and their skills. Our discussion showed that entrepreneurship on one side, and policymaking on the other side, are core dimensions of the generation of value in a creative industry, which only a methodology such as the one we propose can help unlock, via data gathering and analysis.

Our proposal puts the creative workers at its centre and postulates that entrepreneurship is a crucial element in unlocking the potential of these industries. We argue that a proper research agenda should be intertwined with an educational one, which puts entrepreneurship education as a key element of the education of creative artists, for the film and audiovisual industries. We believe this is the only way to move forward if we want to fully unlock the potential of these industries in Europe and particularly in Portugal.

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