EMPLOYABILITY IN THE CULTURAL AND CREATIVE SECTORS IN ARAB MEDITERRANEAN COUNTRIES: THE CASES OF PALESTINE, EGYPT, TUNISIA AND MOROCCO

Technical Assistance Unit of the Med Culture Programme for the promotion of culture as vector of Human, Social and Economic Development in South Mediterranean Countries. EUROPEAID CONTRACT: ENPI/2013/335-088

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JUNE 2016

A programme funded by the European Union

www.medculture.eu

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This report has been produced with assistance of the European Union. The content of this report is the sole responsibility of the Technical Assistance Unit of the Med- Culture Programme. It reflects the opinion of contributing experts and can in no way be taken to reflect the views of the European Commission.

The Med-Culture Project is implemented by the Consortium led by HYDEA S.p.A. (Italy) in partnership with TRANSTEC SA (Belgium), L'INSTITUT NATIONAL DE L'AUDIOVISUEL (France)
and the ROYAL FILM COMMISSION OF JORDAN (Jordan).

EXECUTIVE SUMMARY

One of the main purposes of our study is to provide the conceptual and policy framework for understanding the creative economy, in order to identify major obstacles to employment and employability in the cultural and creative sectors in four Arab Mediterranean Countries [AMC]: Palestine, Egypt, Tunisia and Morocco. We aim to identify the main obstacles facing job creation in these sectors, and assess gaps between the supply of skills (by universities and training centers) and their demand (by the labor market). To what extent are employment policies and Active Labor Market Programs [ALMP] in these countries capable of reducing the mismatch in these areas and supporting youth employability?

A preliminary study (literature review to collect data on the subject, including comparative studies for the four countries, etc.) allowed us to identify the main challenges of the cultural and creative sectors in AMC and to analyze the major characteristics of the labor market (section I). We conducted interviews with key-informants and stakeholders, by developing a single questionnaire (see appendix 1), in order to discuss t he specific challenges of each of the four countries (sections II, III, IV and V). Thus, we tried to combine two complementary approaches in our methodology: analysis of key documents and investigation methods used in development projects. While trying to identify our key informants, we took into account the requirement to meet stakeholders from various backgrounds (including policy makers, cultural managers, artists…). Finally, five sets of recommendations are suggested according to the main issues and challenges facing employability:

1. Improving the attractiveness and the quality of VET
2. Better preparedness of higher education institutions in order to reduce the skill mismatch
3. The budget of ministries of culture should be increased and restructured
4. Need for better synergy between the local and the international scene
5. Better inclusive policies are needed for better jobs in the creative sector

MAIN FINDINGS:

We have identified 5 major obstacles while analyzing the market structure in the cultural and creative sectors:

- The lack of public funding and private investments, instability of financing sources and fluctuations of funds;

- The high "barriers to entry" set for new firms and young professionals wishing to enter the market (especially for young independent artists): These barriers are not due to excessive regulations, but rather seem to be the result of the protection of key market segments by well- established existing firms and renown professional artists;

- The precarious state of local artists and cultural professionals due to the predominance of the informal economy of culture and the absence of large institutional players (such as museums, media libraries, galleries..), especially if we take into account the narrowness of the local art scene and the limited consumption of cultural and creative goods and services in the AMC;

- The weak synergy with the international artistic and cultural scenes;

- The failures in the intellectual property right framework: these failures are threatening the revenues of artists and creative firms, which is creating a supply problem and limiting the creative process.

Regarding employability in the cultural and creative sectors, we have identified 5 major obstacles:

- A strong mismatch between the supply of skills and the market needs because of the quasi-absence of the "competency approach" and the lack of well-defined curriculum and professional knowledge expected from freshly graduated students, the limited cooperation between Institutions of Higher Education (IHE) and private companies, in a context of a lack of national qualification framework for most cultural occupations.

- The lack of orientation of high-school and post-secondary students choosing over-saturated degrees in universities with open access, while the choice of technical education and Vocational and Educational Training (VET) is merely a second best option, and clearly not the result of a long-term strategy or a lifelong learning scheme.

- The poor quality of VET do not allow learners to develop adequate skills that match the market needs, as they usually consist of very short trainings and focus on the basic know- how, leaving aside the soft skills, competencies and performance, that are necessary to career success. Added to this is the problem of the lack of professionalization among teachers/trainers who generally pursue other professional activities and use teaching as a part-time job, which lead to a lack of specialization among learners and jeopardize the sustainability of creative skills.

- The insufficient budgets allocated to culture as well as the lack of transparency make it difficult to retrace public spending on culture (e.g. distinguishing the creative sector from the recreational sector) and to evaluate the effectiveness of cultural policy in general, let alone its effect on employment, in a context of strong dependence of the cultural and creative sectors on the public sector.

- Lack of educational policies and employment policies specifically designed for the cultural and creative sectors.

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ALMP	Active Labour Market Policies
AMC	Arab Mediterranean Countries
ANETI	National Agency for Employment and Autonomous Work (French)
EACEA	Education, Audiovisual and Culture Executive Agency
ETF	European Training Foundation
NEET	Not in Education, Employment, or Training
UNCTAD	United Nations
UNESCO	United Nations Educational, Social and Cultural Organisation
UNIDO	United Nations Industrial Development Organisation
VET	Vocational Educational Training

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EMPLOYABILITY IN THE CULTURAL AND CREATIVE SECTORS IN AMC: A METHODOLOGICAL NOTE

It is difficult to strictly define the cultural and creative sectors as we find different terms in the literature (e.g. creative industries, cultural industries, the cultural economy or even cultural-cognitive economy), and definitions may vary from one national context to another. In our study, we adopt the broader term of "cultural and creative sectors", by which we mean the larger sphere that includes all cultural products and creative industries [creative and cultural industries], following the UNESCO's definition, in its 2013 report on the creative economy [United Nations, 2013].
The common feature of all these activities is that they all carry significant potential for creation and innovation, including artistic products in the strict sense, advertising, computer games, digital products, design and architecture.
That being said, our study will focus on cultural professions and artistic activities, which in the Arab World, constitute the main pillars of the cultural and creative sector.

This cultural and creative sector in the broadest sense is now a major component of economic development in the information era. The international trade of cultural and creative industries is one of the most dynamic sector in the global economy. Between 2000 and 2011, the international trade has more than doubled, and between 2002 and 2011 the average annual growth was 8.7%.
The value of this trade was 424.4 billion USD (3.4% of total trade) in 2005, while this volume was 624 billion USD in 2011 [United Nations, 2013]. In AMC, the cultural and creative sectors have grown significantly between 2002 and 2008, and faster than the rest of the economy [Table 1].

TABLE 1: EXPORT OF CREATIVE GOODS AND SERVICES (IN MILLIONS OF USD), [UNITED NATIONS, 2010]

Country	2002	2003	2004	2005	2006	2007	2008	% 2003 - 2008
Tunisia	106	129	138	150	202	237	262	6.73
Morocco	190	159	162	178	178	207	217	16.97

However, some economic indicators may suggest that this sector is experiencing stagnation since 2008. On one hand, the export of cultural and creative industries in AMC is still growing at an annual rate of 7.03%, which is close to the world's average. However, 14 of the 25 creative and cultural industries identified by the United Nations for North Africa are experiencing a decline in their exports, including an average decrease of 23.61% in exports of audiovisual products, a decrease of 51.74% in exports of new media products, and a decrease of 26.34% in exports of visual arts products [Table 2].

TABLE 2: EXPORTS AND IMPORTS OF NORTH AFRICA BY PRODUCTS, [UNCTAD, 2013]

PERIODS	2003-2012		2008-2012	
FLOW	EXPORTS	IMPORTS	EXPORTS	IMPORTS
PRODUCT	⇅	⇅	⇅	⇅
ALLCREATIVEGOODS	28.40	10.16	7.03	-4.65
ARTCRAFTS	51.17	4.62	19.61	4.09
CARPETS	60.99	37.51	22.68	12.49
CELEBRATION	(5) 8.35	15.63	-29.20	-2.34
OTHER	4.48	18.27	-12.73	16.06
PAPERWARE	31.63	20.30	-48.06	27.41
WICKERWARE	-32.18	9.17	-13.70	-5.35
YARN	47.77	1.28	18.00	-0.17
AUDIOV1SUALS	16.01	21.35	-23.61	-10.85
FILM	(5) 47.97	7.84	(5) 34.41	-14.95
CD,DVD,TAPES	15.50	21.61	-24.62	-10.83
DESIGN	21.12	8.60	2.27	-5.91
ARCHITECTURE	22.71	22.56	72.05	27.93
FASHION	-16.11	-0.52	-45.53	-24.96
GLASSWARE	182.28	35.06	57.64	0.65
INTERIOR	28.92	14.22	1.02	5.08
JEWELLERY	24.03	24.90	-43.17	-14.59
TOYS	(5) -12.44	15.06	-55.47	6.37
NEWMEDIA	25.80	50.35	-51.74	-5.66
RECORDEDMEDIA	21.32	62.46	-53.94	-7.22
VIDEOGAMES	(5) 167.11	24.68	(5) 516.79	15.87
PERFORMINGARTS	18.09	9.68	16.23	-2.02
MUSICALINSTRUMENTS	18.75	9.79	16.23	-1.77
PRINTEDMUSIC	-	-5.84	-	-50.08
PUBLISHING	24.40	11.10	-3.44	-5.25
BOOKS	36.83	6.33	3.87	-5.44
NEWSPAPER	-9.84	12.90	-23.91	-1.30
OTHERPRINTEDMATTER	11.43	14.57	-45.95	-21.00
VISUALARTS	-25.90	15.61	-26.34	0.94
ANTIQUES	(5) -73.38	-33.98	(5) -82.32	-26.06
PAINTINGS	-17.51	19.65	-43.64	-35.21
PHOTOGRAPY	-27.91	4.44	57.69	-15.85
SCULPTURE	-26.52	17.68	-30.36	6.77

Art Crafts became the largest exporting sector (49.88% of regional exports), especially with the export of carpets (33.60% of total export, with a value of 571 million USD in 2012) [Table 3 and 4].

TABLE 3: EXPORTS (%) OF NORTH AFRICA (EXCLUDING SUDAN) BY PRODUCT, [UNCTAD, 2013]

YEAR	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
ALL CREATIVE GOODS	100	100	100	100	100	100	100	100	100	100
ART CRAFTS	17.29	18.13	17.19	15.89	0.63	31.27	38.33	40.98	46.06	49.88
CARPETS	6.87	7.72	7.32	5.68	0.48	19.65	21.2	25.41	28.58	33.6
CELEBRATION	0	0.02	0.18	0.11	-	0.03	0.02	0.02	0.01	0
OTHER	0.41	0.31	0.17	0.18	0.06	0.12	0.11	0.05	0.1	0.04
PAPERWARE	0.02	0.56	0.52	0.12	0	1.35	0.3	0.34	0.07	0.07
WICKERWARE	2.69	1.97	1.34	1.22	0.01	0.08	0.03	0.01	0.01	0.04
YARN	7.3	7.54	7.67	8.57	0.08	10.05	16.68	15.14	17.29	16.13
AUDIO VISUALS	0.71	0.41	0.13	0.47	10.05	0.75	0.39	0.27	0.17	0.21
FILM	0.01	0	0	0	-	0	0.01	-	0.01	0.01
CD, DVD, TAPES	0.7	0.4	0.13	0.47	10.05	0.75	0.38	0.27	0.16	0.19
DESIGN	74.55	72.15	75.09	77.75	45.11	54.32	56.84	51.76	47.26	47.29
ARCHITECTURE	0	0	0	0	0.05	0	0	0	0	0.01
FASHION	46.91	44.12	43.92	34.88	1.76	10.17	6	6.76	8.16	0.3
GLASSWARE	0.15	0.12	0.08	0.03	0	2.29	19.35	18.52	14.35	18.48
INTERIOR	23.34	22.88	25.69	23.69	43.17	34.45	26.53	21.12	22.48	28.14
JEWELLERY	0.94	1.32	1.13	14.56	0.13	5.32	3.64	3.74	0.4	0.34
TOYS	3.22	3.72	4.26	4.59	-	2.08	1.32	1.62	1.87	0.02
NEW MEDIA	0.89	1.53	1.94	1.21	3	9.56	2.04	4.77	4.37	0.12
RECORDED MEDIA	0.89	1.52	1.94	1.2	3	9.56	1.94	2.98	2.6	0.12
VIDEO GAMES	0	0.02	0.01	0.01	-	0	0.1	1.79	1.77	-
PERFORMING ARTS	0.07	0.05	0.04	0.02	0	0.03	0.02	0.02	0.02	0.04
MUSICAL INSTRUMENTS	0.07	0.05	0.03	0.02	0	0.03	0.02	0.02	0.02	0.04
PRINTED MUSIC	-	-	0.01	-	-	-	-	-	-	-
PUBLISHING	2.26	3.29	2.11	2.08	40.6	3.77	2.26	2.07	1.95	2.42
BOOKS	0.85	1.94	0.98	1	5.97	2.67	1.6	1.56	1.55	2.34
NEWSPAPER	1.09	0.85	0.69	0.54	34.28	0.23	0.16	0.14	0.11	0.04
OTHER PRINTED MATTER	0.32	0.5	0.44	0.55	0.35	0.87	0.5	0.37	0.29	0.04
VISUAL ARTS	4.23	4.44	3.5	2.58	0.6	0.3	0.13	0.13	0.17	0.04
ANTIQUES	0.35	0.35	0.34	0.22	-	0	0	0	-	-
PAINTINGS	0.31	0.29	0.1	0.08	0.26	0.07	0.02	0.03	0.02	0
PHOTOGRAPHY	0.54	0.57	0.39	0.19	0	0.01	0	0.01	0.01	0.02
SCULPTURE	3.04	3.23	2.67	2.09	0.34	0.22	0.11	0.09	0.14	0.02

The design constituted 47.29% of exports in 2012, with a value of 541 million USD. Together, these two groups (Art Crafts and Design) constitute 97% of total exports of cultural and creative products. The remainder of cultural and creative products that are exported do not exceed 3%, and therefore are primarily intended for the local market.

TABLE 4: VALUE OF EXPORTS (MILLION USD) OF NORTH AFRICA (EXCLUDING SUDAN) BY PRODUCT, [UNCTAD, 2013]

YEAR	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
UNDEFINED	273	278	300	361	4	862	1294	1382	1437	1145
ART CRAFTS	47	50	52	57	0	269	496	566	662	571
CARPETS	10	21	22	20	0	169	274	351	411	385
CELEBRATION	0	0	1	0	-	0	0	0	0	0
OTHER	1	1	0	1	0	1	1	1	1	0
PAPERWARE	0	2	2	0	0	12	4	5	1	1
WICKERWARE	7	5	4	4	0	1	0	0	0	0
YARN	20	21	23	31	0	87	216	209	248	185
AUDIO VISUALS	2	1	0	2	0	6	5	4	2	2
FILM	0	0	0	0	-	0	0	-	0	0
CD, DVD, TAPES	2	1	0	2	0	6	5	4	2	2
DESIGN	204	201	225	280	2	468	736	715	679	541
ARCHITECTURE	0	0	0	0	0	0	0	0	0	0
FASHION	128	123	132	126	0	88	78	93	117	3
GLASSWARE	0	0	0	0	0	20	250	256	206	212
INTERIOR	64	64	77	85	2	297	343	292	323	322
JEWELLERY	3	4	3	53	0	46	47	52	6	4
TOYS	9	10	13	17	-	18	17	22	27	0
NEW MEDIA	2	4	6	4	0	82	26	66	63	1

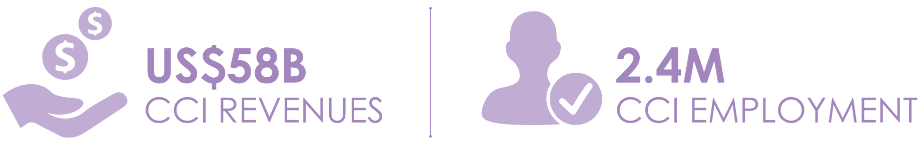
[1] http://www.ey.com/Publication/vwLUAssets/ey-cultural-times-2015/$FILE/ey-cultural-times- 2015.pdf

[2] http://www.ey.com/Publication/vwLUAssets/ey-cultural-times-2015/$FILE/ey-cultural-times-2015.pdf

Figure 1 & 2 Source: EY analysis of cultural and creative markets, 2015

The sector therefore remains at a level of development that is lower compared to the rest of the developing countries. In fact, for the entire MENA region for example, the income from cultural and creative sector amounted to 58 billion in 2013, representing 3% of total revenue, and the sector size is only 1.1% of the GDP of the entire region [Figure 1 and 2].

FIGURE 1: REVENUES AND EMPLOYMENT IN AFRICA AND MIDDLE EAST, 2013[1]



CCI revenues in Africa and the Middle East (US$b) in 2013

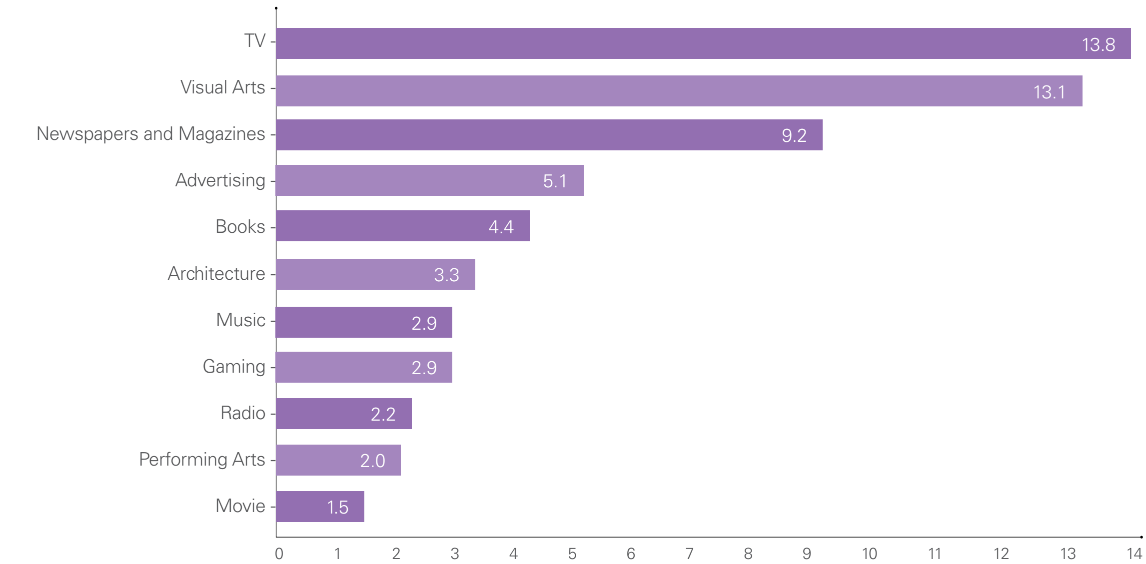
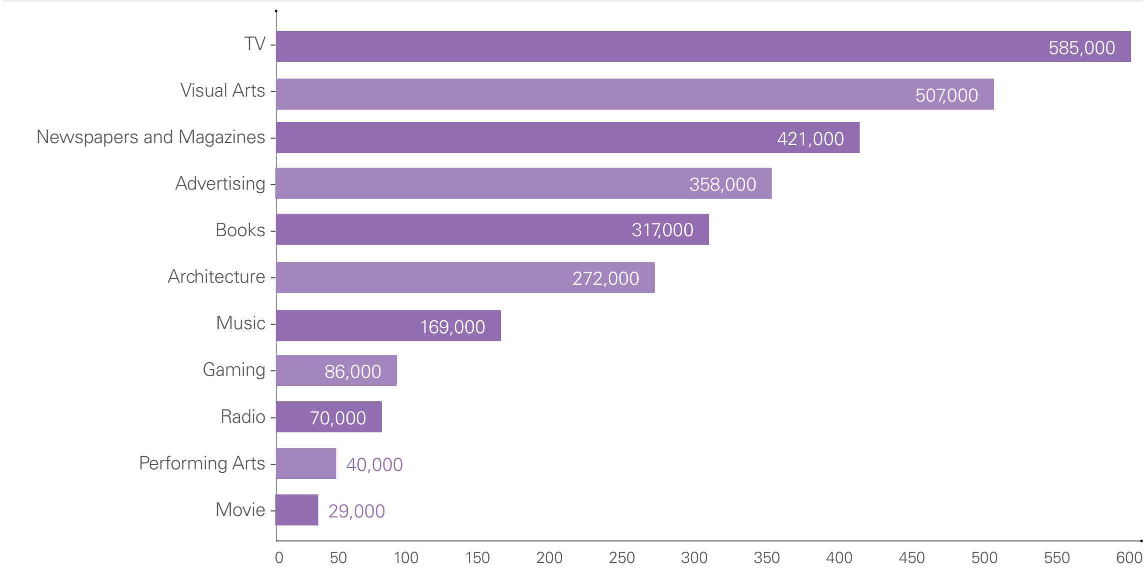


FIGURE 2: JOBS AND EMPLOYMENT IN AFRICA AND MIDDLE EAST, 2013[2]

CCI jobs in Africa and the Middle East (US$b) in 2013



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[3] Indeed, these countries are characterized by a young population (among the youngest in the world)

However, the cultural and creative sectors can provide a powerful lever for economic growth and job creation, especially in the Arab countries where the rapid population growth is associated with high unemployment rate[3]. Similarly, the cultural and creative sectors in these countries combine arts and tourism, traditional handcraft methods and new creative technologies and mass industries, offering increased employment in both the formal and informal economy, on the local and international market. Finally, cultural specificities of each country could turn into a comparative advantage defining a field of specialization in the international trade.

Informal jobs are the major component in the cultural and creative sectors in AMC, occupying 547,500 jobs. This situation is not specific to the creative economy, as it seems to be a general characteristic of the labor market in the AMC. However, the recent tendencies in the cultural and creative sectors distinguish cultural professions from other segments of the labor market. Indeed, employment in the cultural economy is mainly based on talent, on individual creativity and creative skills. In this sense, these jobs are more and more attractive for the youth, because they offer them a flexible career, with great potential for entrepreneurship and self-employment. Creative jobs in the AMC are providing new opportunities for a young generation seeking a higher source of income outside the traditional employment path, while remaining entrepreneurs of their working life. On the other hand, compared to other economic activities, risks are higher in the cultural and creative sectors, because the creators are not sure of their success and the artistic success of a project is not always positively correlated with higher profitability. Moreover, the market structure in the AMC, with a strong predominance of the informal economy, is condemning young creators to spend a part of their career in a precarious situation, as they are often forced to occupy a second job in order to ensure a more stable source of income.

The first common feature of the cultural and creative sector in the four countries of our study is the predominance of small businesses and non-profit associations, who became in the last decades the major actors in the art and culture scene, with a limited presence of large institutional players (such as museums and galleries) and insufficient public funds (even if the State remains the largest employer). In such a market structure, a major barrier to employment seems to be the mismatch between the demand and the supply of skills. On one hand, the majority of young creators in AMC begin their careers by moving towards entrepreneurship and self-employment, through micro-enterprises or non-profit organizations, or even as independent artists or free-lancers (under various statutes of "freelancing": formal, semi-formal, in-formal, casual, seasonal, etc.). On the other hand, the skill supply is maladjusted with this structure, especially in Higher Education Institutions, with a strong predominance of theoretical teaching instead of technical education, and the almost total lack of managerial skills and other soft skills needed.

More generally, the skill gap in the AMC is not specific to the cultural and creative sector as it seems that unemployment is more common among graduates of Higher Education Institutions: a higher level of education tends to be associated with higher levels of unemployment [Martin and Bardak, 2012]. This mismatch remains the major challenge for the economic development and employability in the AMC, especially affecting the youth (and more severely young people between 15 and 24 years). This skill gap is partly explained by the mindset of a large part of the Arab students, who are reluctant to follow professional and technical education.

Unfortunately, traditional education in most universities does not offer a sufficient supply of skilled workers, in adequate with market needs, and yet it remains the choice of the majority. These issues are particularly important in the cultural and creative sector given that cultural professions are not always regarded as "real jobs". Indeed, according to our interviews, we may assert that not all creative jobs are considered as real jobs in the Arab world. Literature and poetry are well respected, writers and authors are considered as serious artists following a respected vocation. Musicians and plastic artists are also respected as their arts are perceived as hard to learn and requiring lot of talents and natural gifts. Technical jobs (sound and light) are less considered as creative jobs, while careers in acting (especially for women) or dancing (especially for men) are still hostage to lot of social and moral prejudice.

TABLE 5: UNEMPLOYMENT AND NEETS, [ETF, 2015]. M: MALE; F: FEMALE; T: TOTAL

	Tunisia	Egypt	Morocco	Palestine
Unemployment rate (15-64 years)	M: 16% F: 24% (2011) T: 19%	M: 9% F: 22% (2011) T:12%	M: 12% F: 12% (2013) T: 12%	M: 20% F: 32% (2012) T: 21%
Unemployment among youth	M: 22.6% F: 45.3% (2012) T : 33.2%	M: 7.5% F: 25% (2012) T: 13.6%	T: 19 % (2013)	M: 9.2% F: 2.7% (2011) T: 29.8%
NEETs (15-29 years)	T: 32,2% F: 42.3%	T: 40.5% F: 64.3%	No data	T: 36.4% F: 48.9%

Studies conducted by the ETF (European Training Foundation) showed weaknesses that increase the skill gap in AMC labor markets (ETF, 2011). From our perspective, we can summarize these weaknesses in 5 points:

1. The skills supply (by universities and educational centers) is dominated by public agents, making it difficult to reform programs and curricula, due to heavy bureaucratic procedures and to administrative hassle.
2. The lack of tools to identify needs, and the absence of prospective studies and forecasts for the labor market in order to anticipate future skills needs.
3. The traditional mentality of learners that we could describe as an "assisted attitude", with a majority of students seeking saturated fields and majors that comply with the requirements of their families, thus joining already over-saturated segments of the labor market.
4. The weak cooperation between universities and private companies.
5. The quasi-absence of the "competency approach": lack of well-defined curriculum and professional knowledge base expected from freshly graduated students, in a context where national qualification framework is lacking for most cultural occupations.

Although one of the greatest challenges of the cultural and creative sectors in the AMC is related to the inconsistency between the supply and the demand of skills, graduate unemployment is not only due to the inadequacy of the education system; it is also explained by the low dynamic of the labor

market and the insufficient creation of skilled jobs. The remaining of the report will focus on these two aspects of the skill mismatch in the cultural and creative sectors in the 4 countries of our study and on related active labor market programs.
This leads us to a methodology in 4 steps:

1. Identifying the major institutions of higher education in each country and the training programs in order to evaluate the skill supply: At this level, we try to follow one or more profiles of fresh graduates, in order to see to what extent the educational system supports youth employability in the cultural and creative sector.
2. Identifying existing employment policies and active labor market programs related to the cultural and creative sectors. at this level, unfortunately, we do not have an inventory of employment policies or ALMPs specific to the cultural and creative sectors. We try to compensate this missing data by analyzing the cultural action of key institutional agents involved in mobility, professional insertion and vocational integration.
3. Assessing the prospects for self-employment and entrepreneurship in the cultural and creative sectors. At this level, we try to identify the major professional paths in the informal and semi-formal cultural sector, through interviews with artists and creators in a situation of self-employment and free-lance in each of the 4 countries of the study.
4. Identifying the major barriers to employability in the cultural field, through interviews with major stakeholders and experts in the cultural management and cultural policies, as well as representatives of public institutions involved in the management of ALMP.

II EMPLOYABILITY IN THE CULTURAL AND CREATIVE SECTOR IN EGYPT

A) SUPPLY AND DEMAND OF SKILLS IN THE CULTURAL AND CREATIVE SECTOR IN EGYPT

Like other Arab countries, some segments of the cultural and creative sectors are experiencing significant growth in Egypt, especially architecture, design and digital creation. These segments are attracting the largest number of students while participation in crafts and traditional arts (Nubian decorative arts, pottery, ceramics, etc.) is decreasing. Nevertheless, it appears that these segments have already reached their saturation level. Egypt already has more than 100,000 architects with 6000 new entrants to the labor force each year. The growth in the advertising industry and the new media is certainly helping in absorbing a part of the new entrants of designers and web-developers, but these professions are precisely those that are suffering the most from informal, occasional or irregular jobs.

Out of the 58 certified Institutions of Higher Education, 27 are located in Cairo and Alexandria, these two cities having the largest concentration of the country's cultural activity. The main universities offering cultural education are: the Academy of Arts (with its Higher Institute of Dramatic Arts, the Higher Institute of Arabic Music, the Conservatory of Cairo and the Higher Institute of Cinema), the Faculty of Arts at Cairo University, Faculty of Fine Arts of the University of Alexandria, the American University in Cairo. Outside Cairo, the main universities are the Faculty of Fine Arts at Alexandria University and the Faculty of Arts at the University Ain-el-Shams.

The skill supply in the cultural sphere is not only limited to universities, since the professional centers and vocational education and training (VET) provide the largest number of professionals working in the cultural and creative sectors in Egypt. However, it is widely accepted by experts that Egyptian universities offer a better quality education, when compared with vocational education and training. Nevertheless, university degrees do not necessarily increase the probability of finding a job and the unemployment rate of higher education graduates remains higher than that of VET. Also, one of the priorities of cultural and educational policies of Egypt should be to improve the quality of education and training.

The Ministry of Education is responsible for 1,600 technical centers and institutes (with nearly 2 million learners), and the Ministry of Higher Education is responsible for 47 technical institutes with more than 100,000 new entrants each year [Abraharrt, 2003]. Although the vast majority of these students chooses commercial and industrial training, the fact remains that VET is a major component of the skill supply in the cultural field, as it allows a large number of youth to enter the labor market, especially for technical jobs related to cinema, television and theater.

VET is also the first provider of skills in handcraft creation. It is also the primary source of training for cultural management (e.g. a program coordinated by the Goethe Institute, but that does not offer a degree recognized by the state), and cultural entrepreneurship (a program funded by the European Union for owners and directors of art centers in music and visual arts).

However, cultural experts in Egypt point out the poor quality of VET whose contents are not adapted to market needs: often, their programs follow the trends of the moment, in terms of competence, and do not have well-defined curricula. VET in the field of culture in Egypt also seems to face numerous challenges, summarized in four points:

- The VET does not provide adequate transition to the labor market: learners head to these programs as second best choice, because they seem less risky, and of shorter duration than the initial education provided by universities (which, in addition, do not guarantee good jobs). The choice of VET is not the result of a long-term strategy and does not fit with a lifelong learning scheme. The access to initial education in universities is becoming more difficult in Egypt, and this is one of the main reasons explaining the choice of VET.
- Many of the students who choose technical training are between 15 and 18 and occupy irregular (seasonal or intermittent) work. Moreover, they occupy various other jobs in parallel, which raises the issue of sustainability of acquired skills.
- The VET does not offer contents tailored to market needs: the quality of technical and vocational education does not allow learners to develop adequate skills, as they often consist of very short trainings focused on the basic know-how, leaving aside the soft skills, competencies and attitudes that are necessary to career success.
- The VET suffers from a lack of public funds, and from a governance problem: public funds are insufficient and international funding and donations are sporadic and often poorly coordinated. Since the early 2000s, the Egyptian government has created the Supreme Council on Human Resource Development whose function is to coordinate the VET, giving a greater coherence to the employment and educational policy. However the Commission is mainly concerned by industrial and commercial training while the absence of a national framework for qualifications in the cultural field continues to weigh on the skill supply.

B) ALMP IN THE CULTURAL AND CREATIVE SECTOR IN EGYPT

As in most of AMC, the cultural and creative sectors in Egypt strongly depend on public funding and the action of public agents. Government entities that are responsible of the cultural policy in Egypt are mainly the Ministry of Culture and the Supreme Council for Culture. The latter finances the cultural action and fulfills a threefold mandate:

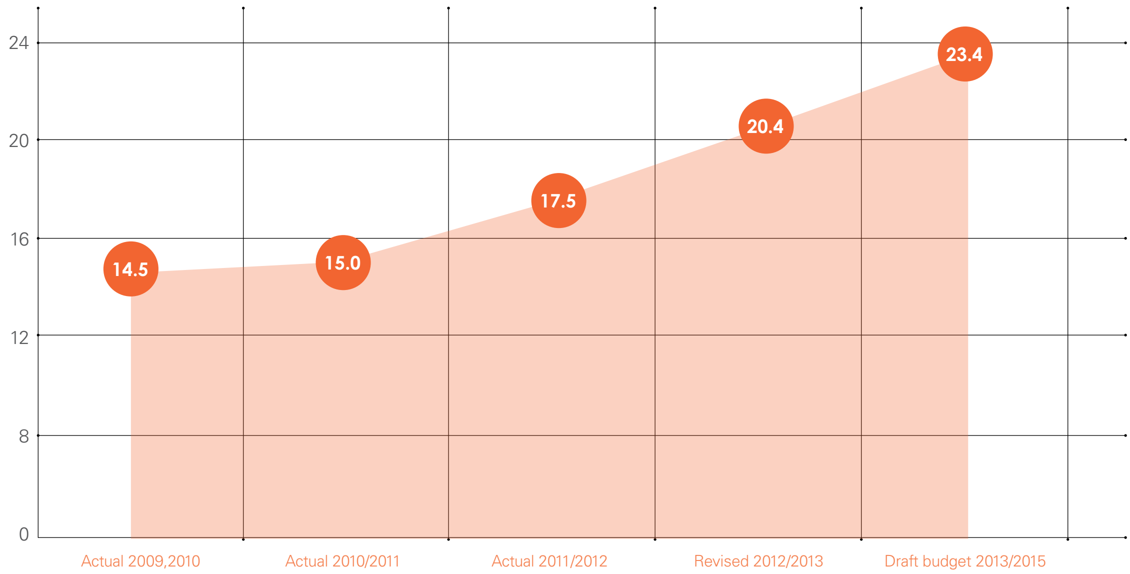
- To develop the cultural policy in Egypt;
- To advice the government on cultural matters;
- To support the creativity in the field of culture and arts.

It is difficult to retrace public expenditures on culture as they are part of a larger budget item comprising "Recreation, Culture, and Religion". Shifts in public spending can therefore hardly be retraced in a linear fashion. However, financial resources are certainly insufficient.

In 2011, the last date on which it is possible to trace the structure of expenditure in the budget of the Egyptian state, the cultural budget amounted to $ 188.5 million, or 7.2% of the budget of "Recreation, Culture, and Religion" (which itself constitutes 3% of the total budget). This budget shows that the office of the Palace of Culture received the largest share of the national budget devoted to culture (23.7%) followed by the Central Administration for Cultural Development (with 13, 9%) and by the National Cultural Center (Opera) and the Academy of Arts (9.4% and 8.6% respectively). It is noteworthy that the National Film Centre receives a marginal part of the budget (1.1%) [Kessab, Bensliman, 2013].

Between 2006 and 2015, the volume of the budget for "Recreation, Culture, and Religion" has tripled. But the total budget itself having tripled over the same period, we estimated that the share of cultural spending in the total budget has remained practically unchanged, so that the cultural budget remains around 0.25% of the total budget on average, according to our calculations. Indeed, the functional classification of the 2013-2014 budget shows that public expenditure on culture continues to evolve in the same proportion as the total budget [Figure 3].

FIGURE 3: EVOLUTION OF EXPENDITURES OF RECREATION, CULTURE AND RELIGION 2009-204, FUNCTIONAL CLASSIFICATION, MINISTRY OF FINANCE, EGYPT, 2014 (IN MILLION DE EGP)



The increased volume of expenditure does not serve the development of the cultural sector in Egypt, nor support employability, since the proportion of this expenditure remains virtually unchanged and, in any case, at a very low level, below the level of 1% recommended by UNESCO. Similarly, one can legitimately question the effectiveness of these expenditures, since much of this budget is spent on running costs and operating expenditures, specifically wages and salaries, [Table 6]. The share of wages and salaries remains around 60% of the total budget allocated to the "Recreation, Culture, and Religious Affairs", between 2009 and 2014.

The budget of the "Recreation, Culture, and Religion" is also devoted to the purchase of goods and services, while only 6% of the budget is dedicated to grants, scholarships and aid funds. These expenditures are dedicated to renovation of buildings (Opera, Palace of Culture, etc.) and the management of public institutions and public spaces, and therefore do not directly benefit creators and artists.

In addition to the Ministry of Culture, the Ministry of Foreign Affairs mobilizes resources for cultural spending, especially for the Egyptian cultural action abroad, and the Ministry of Higher Education is also an important actor in the cultural policy. Finally, trade unions play an important role in the cultural and creative sectors in Egypt, which is certainly one of the main characteristics that distinguish this country from other AMC.

TABLE 6: EXPENDITURES OF RECREATION, CULTURE AND RELIGION, FUNCTIONAL CLASSIFICATION, MINISTRY OF FINANCE, EGYPT, 2014 (IN MILLION DE EGP)

Description	Draft budget	Revised	Actual		
			2011/2012	2010/2011	2009/2010
Gross Total	23403	20366	17496	14977	14842
Wages and Compensation of Employees	15274	12589	11868	9184	8235
Purchase of Goods and Services	1553	1541	2402	2150	2348
Interest	1	1	0	0	1
Subsidy, Grants and Social Benefits	1635	1567	1339	1326	1330
Other Expenditures	532	666	152	188	472
Purchase of non-Financial assets (investments)	4408	4002	1735	2129	2456

C) VIEWS ON SELF-EMPLOYMENT AND ENTREPRENEURSHIP IN EGYPT

In Egypt, cultural professions are mostly regulated by unions, and require obtaining the professional card of the union. This requires an authorization request (with registration fees) and the payment of an annual fee. The union imposes around 20% dues on all productions, which ensures pension benefits at the retirement age. However, artists with the lowest income are incapable of ensuring their regular fees payment and contributions. According to an estimation from 2007, the salary ranges between 600 and 5000 Egyptian pounds per month (between 75 and 650 dollars) depending on the profile of the artist [UNESCO, 2007] and it is common for Egyptian artists to choose informal work in order to avoid declaring their income.

Informal work in the cultural sector mainly concerns workers who have no official contract or who do not benefit from social security. It is certainly impossible to estimate its importance in the cultural and creative sectors in Egypt because statistics on this subject are lacking. However, like other sectors, it probably concerns a majority of workers. Indeed, most professionals in the cultural sector occupy a second job that ensures a more stable income or declare their cultural occupation on irregular, intermittent or seasonal basis.

Finally, some hosting structure and reception facilities in Egypt are offering good opportunities for young artists and involving established artists in the development of local and national cultural policies. For example, state artists (or artists paid by the state) are responsible for the management of some public cultural spaces. They also offer public aid funds and the possibility for other non-institutional artists and cultural organizations to use these spaces. "Declared" artists (registered with unions) can freely use these spaces without paying rent, unlike the "private" troops or independent artists. The major institutional failure remains the problem of the artistic distribution. The infrastructure responsible of the diffusion of culture (museums, galleries, concert halls, libraries and mediatheques, etc.) is insufficient. Both at the level of production and distribution, the current art scene is restructured and institutionalized around small associations that bring together creative youth. However, the association status often excludes these creators from public funds and official networks (since they often do not declare their activities and do not pay taxes) and financial problems threaten the continuity and sustainability of their activities.

D) CONCLUSION: MAJOR OBSTACLES TO EMPLOYABILITY IN EGYPT

- The skill supply: Universities provide better training compared to VET in Egypt, but they are more expensive (opportunity cost) and riskier, and do not increase the probability of finding jobs. VET is the main source of skill supply, and provides the largest number of workers in the cultural sector. However, for both Higher Education Institutions and VET, there is a strong mismatch between the skill supply and the present and future needs of competences on the market. This gap is due to the lack of the "competency approach" and the lack of well- defined curricula and professional knowledge expected from freshly graduated students. In most cases, the program content is not up to date. And when programs are updated, they mainly serve the common purpose of diversifying the supply in order to attract new learners, instead of offering to match the graduate's profiles with the market needs. The lack of qualification framework for most pro-cultural occupations is certainly the main handicap at this level.
- The cultural policy: The sector of culture and creativity is highly dependent on public funding and regulation of trade unions. However, the budgets allocated to culture are insufficient, and they lack transparency. This leads to two constraints: on one hand, it is difficult to trace public spending on culture (e. g. distinguishing the part of the creative and the share of recreational); on the other hand, it is difficult to assess the effectiveness of cultural policy in general, and to what extent it supports employability. We estimated that the budget allocated to culture is evolving proportionally with the annual increase of the total budget, retaining a share between 0.21% and 0.25% of the total budget. We concluded that the increase in the volume of public expenditure on culture is only due to the regular swelling of the overall structure of the budget, and therefore does not serve the purpose of developing the cultural sector nor employment in the cultural field. The general tendencies of cultural policy remain unchanged, with a structure that is mainly dedicated to operating expenses, wages and salaries, renovation and maintenance of buildings, without a direct positive impact on employability or on artists and workers in the cultural and creative sectors.
- Young artists: Young artists are mainly attracted to music, theater, cinema, and design (graphic, web, interior, fashion), at the expense of the so-called "traditional programs" (art craft, pottery, leather carpets, etc.). However, even in the growing segments of the market, experts complain from the lack of technical skills (especially: sound, lighting, installation, set design), and from the lack of professionalization among young graduates. Workers occupy several jobs at once, which leads to the lack of specialization and to the non-sustainability of skills acquired through training and/or professional experience. Finally, the sector suffers from the dominance of the informal economy of culture, due to the lack of large institutions (galleries, museums, libraries, etc.). The major cultural agents are small associations whose sustainability is often threatened by lack of funds. At this level, a major failure is the lack of training in cultural management and the problem of uncertainty in assembling and managing cultural projects: many cultural events may be canceled at the last minute, no specific regulatory framework, incomplete contract…

III

EMPLOYABILITY IN THE CULTURAL AND CREATIVE SECTORS IN PALESTINE

A) SUPPLY AND DEMAND OF SKILLS IN THE CULTURAL AND CREATIVE SECTORS IN PALESTINE

Palestine has a large number of universities for a small country (49 Higher Education Institution, which include universities and community colleges) [EACEA, 2012]. The skill supply in the cultural and creative sectors is mainly provided by these institutions (unlike Egypt, where the VET trains the largest number of workers). The major Palestinian universities that produce new artists and cultural professionals are: Al-Quds University in Jerusalem, including the Fine Arts and the Faculty of Music Education; the Faculty of Fine Arts, An-Najah National University in Nablus, Bethlehem University, with its courses in audiovisual and music; Bir Zeit University, particularly with its architecture program and its Masters in Urban Planning and landscape architecture, the Al-Aqsa University in Gaza, especially with training in audio-visual, in Fine Arts and Interior design. The University Al-Aqsa is the main institution in Gaza (with the Islamic University, which only offers a few courses in Art and Literature and Literary Criticism).

However, university programs suffer from inadequate content and skills, and they are outdated when compared to the market needs while, unlike Egypt, VET is often considered as offering better programs in Palestine. The following failures in the educational system can be listed as follows:

- Lack of the "competency approach" and the lack of well-defined curricula and professional knowledge expected: the educational interest is focused on the preferences of the teacher (teacher-centered education) and theoretical teaching (memorization of the content) and not on active learning practice (building practical know-how and appropriate attitudes, like freedom of cultural expression and originality).
- Lack of professionalization of scholars and university professors: they usually occupy another job (particularly for international NGOs or the government) and they consider their educational occupation as being a stepping-stone for a better career, or merely as a source of prestige or recognition, and not as a career in itself.
- The weak link between higher education institutions and the labor market and the lack of cooperation with private companies: thus, even technical or professional trainings that are required by universities are not directly related to careers and do not allow the acquisition of new know-how (most internship hours are used in humanitarian work and social, unrelated, training).

Recently, the University Dar al-Kalima (College of Art & Culture) has become a major player in providing training in the cultural and artistic fields. The University started first as a training center. The institution now offers university courses with Bachelor's degrees, and has become an indispensable reference in the cultural scene in Palestine, including the cinema and audiovisual, glass design, jewelry design, music and theater.

The development of this university fits well into the evolution of the Palestinian labor market, experiencing rapid changes in the last 20 years with an expansion of its tertiary sector and a shift to an economy of services. Unlike Egypt, a small share of the labor force works in agriculture (10%) while the majority of workers are employed in the tertiary sector, especially in commercial services, restoration and hotel industry, education and health. Almost the third of the Palestinian population is between 15 and 29 years old, and this young population is moving more and more towards cultural and creative sectors, mainly by choosing cook or chef training, advertisement, design and digital training (web development and multimedia, copyrighter). These segments are experiencing significant growth due to the sufficient supply of "average skills" or "intermediate skills", through community colleges (two-year training programs). Because the Palestinian labor market is more flexible than that of Egypt, young graduates are more adaptable to market changes: they give priority to short programs at the expense of "highly qualifying" but over-saturated programs (as architecture and engineering) that used to attract a lot of students (and continue to do so in Egypt). These saturated segments are experiencing high unemployment rate and graduates are often required to perform executives or administrative tasks in positions that are not related to their initial education.

For artistic programs, the largest number of students in higher education is now moving towards audiovisual arts, theater and music. However, a recent trend consists in an increased number of learners moving towards new programs such as decorative arts, jewelry (particularly silver), ceramics, glass design, and turning away from traditional handcrafts (as embroidery, soap, olive wood products, etc.). Training offered by VET and NGOs (like Dar al- Nadwa and Dar al-Kalima) are the main source of skill supply for these new programs, particularly through short courses and workshops organized with foreign funds and with cooperation with international well-known artists and trainers. Compared to university courses, one of the major advantages of these "short programs" is that they induce significant exchange of expertise with international experts who often work on a voluntary basis. Another advantage of these trainings lies in the close links with the labor market and its access to a better distribution. Indeed, a large number of trainings and workshops gives rise to exhibitions (organized by universities, training centers and local and international NGOs), and cultural events that have a dual benefit: helping the diffusion of young local creators and artists, thus giving them international exposure, and having an important community impact (empowerment for women, refugees, etc.).

B) ALMP IN THE CULTURAL AND CREATIVE SECTOR IN PALESTINE

VET is under the responsibility of two ministries: the Ministry of Higher Education and the Ministry of Labor. The good coordination between these two ministries is often cited as an example of good practices in the AMC [ETF 2014 e], particularly in regard to their cooperation with other stakeholders, including chambers of commerce and industry, private companies and potential employers, and the UNRWA (responsible for some training centers in camps). However, technical training centers and vocational education does not attract large numbers of students. Only 6% of high school students attend VET, and they choose mainly industrial and commercial training, and not artistic training.

The structure skill supply in Palestine seems to be the opposite of the Egyptian case, where majority of students rely on VET of lesser quality. Although VET in the cultural field are considered as high quality education, they attract a small share of Palestinian students. Most students are moving toward universities whose programs are not always in line with the labor market.

Regarding the cultural policies, the major failure is the lack of direct support from the Palestinian authorities to the cultural and creative sector. Thus, there is no real political support for creators (no social coverage) and the cultural policy is merely symbolic (no subsidies or aid for private companies).

Still, the state remains the first employer in the country, and the Ministry of Culture is the largest employer in the cultural sector. But financial resources are limited and recruitment is often linked to rent-seeking and fictitious jobs.

Cultural funding therefore comes mainly from international aid, which poses two related problems: the problem of lack of coordination in the cultural action, and the problem of sustainability of cultural enterprises and activities. Thus, changes in the donor's agenda may jeopardize the work of NGOs and independent artists. For example, the Gaza war in 2014 provoked a drastic decline of international funding dedicated to culture: the call for projects are fewer, the financial resources and the pools are smaller, and humanitarian action is often competing with the cultural action.

Therefore, the major actors in the Palestinian cultural scene remain the NGO's and community engagement programs and initiatives that use culture as a mean to defend the Palestinian identity, the cultural and historic heritage of Palestine, and Palestinian culture.

C) VIEWS ON SELF-EMPLOYMENT AND ENTREPRENEURSHIP IN PALESTINE

With the expansion of audiovisual arts, advertising and digital creation, TV and radio are the main targets of young graduates seeking jobs in the formal or semi-formal economy. The existence of a large number of radio and local television chains has a positive effect on youth employability because young graduates are acquiring professional experience and practical know-how and thus compensate deficiencies in their initial education. At this point, it is necessary to distinguish between two regions that constitute two distinct employment areas, which are the Gaza Strip and the West Bank, and for each region, to differentiate between two segments of the labor market: the public and the private. Regarding employment in the private sector in Gaza, the average salary is 200 USD/month for a technician working in sound or light (in the private or local radio or even television), while wages are considerably higher in the West Bank (around 300 USD for an equally qualified technician). That being said, the competition is stronger in the West Bank and the market there is more flexible. For example, in Gaza, it is more difficult for newly graduates to enter the labor market in its formal segment, as new opportunities are limited and the market is well controlled by established professionals who rarely give any chance to outsiders (there are high barriers to entry that are based on clientelism and patronage, personal relationship, etc.). Most graduates will therefore turn to informal jobs and rely on volunteering, mutual aid and solidarity to ensure the production of cultural events. In the West Bank, the market also suffers from an overflow of the informal political economy of culture. As other sectors, most firms are small family business (in the Palestinian economy, 95% of firms are SME, which employ an average of 5 employees). Only the third of private companies are registered with chambers of commerce (which they are required to do by law, e.g. architectural bureau, beauty institutes, television and local radios are not registered). In a survey of the Chamber of Commerce of Bethlehem, on 6724 enterprises, only 2,200 were registered with the chamber, among which 2 TV and 3 radio stations. Finally, it is possible to identify some clusters in the fields of cultural and creative industries that could experience a significant potential growth in the future, despite the lack of public support: embroidery and leather goods in Hebron, furniture in Nablus and Salfit, marble and textiles in Bethlehem.

D) CONCLUSION: MAJOR OBSTACLES TO EMPLOYABILITY IN PALESTINE

- We found a huge number of higher educational institutions in Palestine that attract the majority of learners. But the quality of higher education suffers from the lack of professionalization among teachers and from the lack of connection with private companies and with the labor market. The VET offers good qualifications but does not attract many students. Hence there is a need to reform the curricula of higher education institutions and to increase the attractiveness of VET, particularly among young people.
- There is a lack of a coherent educational policy and a delay in the entry of Palestinian universities in the Bologna process. Each higher education institution decides for itself the curriculum and almost automatically obtains accreditation from the Ministry of Higher Education [EACEA, 2012]. It should be noted that the lack of soft skills is the major handicap for self-employment and entrepreneurship among graduates, who often fail to undertake a sustainable cultural action because of the inadequacy of their organizational or managerial skills (time management, pricing of their cultural products, respect of timelines and deadlines, etc.).
- Concerning artistic programs, the largest number of students is now moving towards audiovisual arts, theater and music. However, there is an insufficient supply of skilled technicians (sound, lighting, scenography and stage design, etc.). This lack is currently offset by job opportunities in television and local radio, which allow young graduates to acquire the expertise through professional experience.

IV EMPLOYABILITY IN THE CULTURAL AND CREATIVE SECTOR IN TUNISIA

A) SUPPLY AND DEMAND OF SKILLS IN THE CULTURAL AND CREATIVE SECTOR IN TUNISIA

The creative and cultural sector in Tunisia is dominated by Art craft and traditional handcraft, which is still experiencing an important expansion (unlike Egypt or Palestine). Currently, 117000 Tunisian craftsmen are registered at the National Handicrafts Office, 12000 artisan workshops are registered at the Industry and Innovation Promotion Agency [Agence de Promotion de l'Industrie et l'Innovation] and 10000 handcrafted furniture companies are registered at the Technical Center of Wood Industry and Furniture [Centre Technique de l'Industrie du Bois et de l'Ameublement] [UNIDO, 2015]. Artistic processes and the raw materials used by these artisans are very diverse: carpets, clothes (cook, wool, etc.), shoes, furniture, etc.

Currently, audiovisual arts and the media sector are also expanding. These segments are the second employers in the cultural and creative sector in Tunisia (after Art crafts), and they are the most attractive to youth (the first source for youth employment) in Tunisia and Morocco [UNESCO, 2013]. There are currently 100 film production houses and 650 professional workers in Sfax. Similarly, there are over 10,000 active musicians, 30 production companies and 70 musical microenterprises. These segments are followed by the design industry which is also experiencing growth in recent years. Currently, this sub-sector is involving between 300 and 400 professionals [UNIDO, 2015]. That being said, the film industry is still very dependent on international funding due to the decrease in the number of movie theatre (from 120 in 1956 to 10 in 2013). For this reason, actors, artists and filmmakers are forced to work for TV [Helly, 2014].

Moreover, there is insufficient job creation on the labor market. The last employment survey conducted in Tunisia in 2012 showed that the additional applications for new jobs increased by 80.4% on average, while the job creation was 60.7% on average between 2007 and 2012. In addition, at the time this survey was conducted, the number of informal workers or unemployed self-employees was not counted in official statistics. Since the 2010 crisis, two phenomena have emerged in Tunisia: there was a polarization effect in employment (widening gap between higher income jobs and lower income jobs); and the link between higher education and employment has almost disappeared. That being said, the skill mismatch in the Tunisian labor market is a challenge for policy makers especially because it affects the majority of the economic sectors, not merely creativity and culture.

Among the ten best universities in Tunisia, seven institutions offer cultural and creative programs that seem, at least in theory, in line with the trends and the needs of the labor market. Schools of Fine arts exist in major universities. Higher education institutions offer programs in all forms of design, heritage management, plastic arts, music, theater, fashion, audiovisual arts, etc. However, the main problem in these universities is the quality of practical skills offered. The best university in Tunisia has an impact factor of 18.67 compared to that of
26.4 in Morocco. Moreover, these universities' programs, despite their diversity, lack practical know-how. The graduates are unable to find satisfactory jobs at the end of their program, or do not achieve an easy transition to working life due to lack of basic transversal and soft skills.

Finally, there is no sufficient exchange and cooperation between the labor market and universities.

B) ALMP IN THE CULTURAL AND CREATIVE SECTOR IN TUNISIA

In an attempt to offset the deficiencies in university courses, several programs specifically targeting youth have been implemented through the National Agency for Employment and Autonomous Work (ANETI - Agence nationale pour l'emploi et le travail indépendant) and their main tasks are the following:

1. 1Decrease the skill mismatch in the labor market.
2. Provide trainings that might be complementary to universities' programs.
3. Play the role of intermediaries between the labor market and universities and facilitate the transition to professional life.
4. Encourage entrepreneurship.

One of the key missions of ALMPs is to promote training courses, professional traineeship and internships in order to facilitate the transition to professional life: these programs give students an allowance of 73.5 dollars per month, to be added to what they are already receiving through their internship. In conclusion, the educational policy seems to support VET; but the cultural policy and specific programs in the cultural and creative sector still need to be assessed in order to understand how the State intervention is affecting employability.

First, the Tunisian government has long supported arts and cultural action, through legislation, policymaking and policy implementation. Tunisia was the first country that signed a bilateral agreement on cultural cooperation with Algeria in 1963 [Al Mawred Al-Thaqafi, 2010]. This particular interest in culture has increased after the Arab Spring and this clearly appears in the larger share the cultural action is getting within the national budget. Indeed, the cultural expenditures increased from 84.4 million USD in 2010 to 107.2 million USD in 2011, an increase of 27% [Kessab, Bensliman, 2013]. In 2015, after making a few cuts in the budget of the Ministry of Culture and Heritage Preservation (Ministère de la Culture et de la Sauvegarde du Patrimoine MCP), the state granted a cultural budget of 96.9 million USD, compared to 87.07 million USD in 2014.

Therefore, the public funds for culture seem satisfactory in Tunisia, or at least we could say that the Tunisian government is tending to reach the target of dedicating 1% of its national budget to culture, as advised by UNESCO. However, the perpetual fluctuations in the cultural budget and the non-sustainability of cultural funds are a problem negatively affecting cultural and creative sectors in the entire Arab world: private patronage and sponsoring, public funds and international aids are not stable, and may vary enormously from one year to another. Since not all Arab governments consider cultural policy as a central priority, any social, economic or political instability will lead to cuts in peripheral budgets such as the Ministry of Culture.

Similarly, state support and aids to creators and artists are not integrated into a long- term strategy for sustainable cultural development. They are punctual and applied within very specific situations, and some public action does not serve the global development of the sector, such as buying artistic products that will not be exposed. For example, in the previous decade, Tunisia has accumulated 7000 art works bought from local producers that were never exposed and never figured in any catalog [UNESCO, 2007].

The Ministry of Culture and Heritage Preservation implements its policies in collaboration and with the support of the Supreme Council of Culture. Its main mission is to democratize culture, considering it as a mean to protect minorities and to observe fundamental rights and freedoms [United Nations, 2013]. Its main support is given to festivals because they are considered as the major events allowing professional creators to expand their networks and to disseminate their production to the largest audience. Similarly, festivals have indirect positive impact on the local economy, supporting job creation and creating new opportunities through increased consumption - especially of artistic products - and the reduction of gender discrimination (through the promotion of the figure of the woman-artist). The festival most supported by the Ministry of Culture is the music festival in Carthage, and its funding is managed by a public agency. In 2013, its budget was 1.4 million USD and one third of this budget was covered by the Ministry of Culture [Sakli, 2013].

However, there is a risk resulting from the over-development of festivals and from the exclusive attention given to cultural activities developing on the margins of festivals, which is the risk of turning the cultural economy into an economy of festivals (with the risk of subordinating culture to tourism, and the creative to the recreational economy). According to the UNESCO report of 2007, Tunisia sets up an average of 400 festivals a year. This is a common risk to all AMC, where festivals capture much of the funding and sponsors in the creative and cultural fields. In a country as little as Lebanon for example, we have calculated at least 54 annual and regular festivals. This boom of the festival economy exasperates numerous independent artists and creators who remain excluded from official channels of festivals, and who consider it as a domination of pop culture and mainstream artists. That being said, festivals remain the major cultural events attracting most investors and sponsors because they generate high economic value (probably because they benefit from the highest media coverage in the Arab world).

On the other hand, tourism and recreational activities sometimes serve the interest of artists and cultural professionals and the festival economy is an important drive for cultural action in Tunisia. A strong cooperation between the Ministry of Culture and the Ministry of Tourism is often cited as an important asset of the Tunisian scene. These two ministries are thus the two major players in the cultural policy in Tunisia. The Ministry of Culture is divided into several branches, each with a specific field of action: books, museums, heritage, performing arts, audiovisual arts, architecture and trade, and dance. Several other organizations are also involved in the management of the cultural policy, but the action of the Ministry of Tourism is vital for the sector by managing cultural components of the touristic development policy and supporting cultural tourism.

C) VIEWS ON SELF-EMPLOYMENT AND ENTREPRENEURSHIP IN TUNISIA

The Tunisian public structure suffers from several shortcomings that affect cultural professionals negatively. Tunisian artists mostly live in poverty. They often need another job in order to support themselves. The state has no specific employment strategy in the cultural and creative sector that receives the same treatment as other sectors. Employment is stimulated through the system of aids for job creation. Artists declaring their activity to the state receive social benefits (health care and cash benefits), retirement pension, disability benefits (2002-104 law of 30/12/2002). Yet the union dues are set to 11% of the income and the social security is partly funded by a small yet variable fee on tickets prices (Presidential Decree 2003-457 of 24/02/2003). The independent artists (if they choose to contribute) have an automatic 15% withholding on their revenues or contract to finance coverage. That being said, artists choose to work in the informal economy given the high level of taxation.

There are also many other organizations that support cultural and creative activities in the country. However, experts estimate that 80% of these organizations have no legal status, which means that they are highly dependent on public authorities [Helly, 2014]. The private sector also plays a role in financing the cultural sector and creativity in Tunisia. The Tunisian diaspora finance projects related to culture, like Muzaq, a Tunisian NGO created by the diaspora, who implemented the program "Dream City" in order to support street arts and to diffuse performing arts in public spaces, as well as the program "Laaroussa" a platform dedicated for skill transfer in the field of traditional handcrafts and pottery, putting together Tunisian women from urban and rural areas with creative women from Europe.

After the 2010 revolution, the role of the private sector has increased through the implementation of new private cultural projects. Cultural practices are becoming increasingly decentralized and deconcentrated [Kessab, Bensliman, 2013]. But there is always a missing connection between cultural professionals and the State: politicians do not really seem to understand how the Tunisian art scene is evolving and do not know how to meet the artists' needs while the latter may not be able to accommodate themselves with the state regulations.

D) CONCLUSION: MAJOR OBSTACLES TO EMPLOYABILITY IN TUNISIA AND SUGGESTED RECOMMENDATIONS

- The quality of training offered by the institutions of higher education is one of the major weaknesses of the creative and cultural sectors in Tunisia. Compared to Morocco, the best Tunisian universities have a lower impact factor. The lack of practical education is the main characteristic of their programs. Similarly, graduates are unable to find satisfactory jobs at the end of their program, and to succeed in a rapid transition to professional life.
- Despite the increase in the budget for culture, the market is characterized by insufficient job creation, and the incapacity to absorb new entrants to the market. The number of workers in the informal sector (self-employed or unemployed) is increasing, despite the public support to job creation and internship programs.
- The dominance of the festivals economy in the creative and cultural sectors may be at the expense of other artistic and cultural initiatives and may increasingly be crowding-out independent artists. More importantly, it may be absorbing a significantly increasing part of public funding.

V EMPLOYABILITY IN THE CULTURAL AND CREATIVE SECTOR IN MOROCCO

A) SUPPLY AND DEMAND OF SKILLS IN THE CULTURAL AND CREATIVE SECTOR IN MOROCCO

In Morocco, the cultural economy is strongly linked to heritage and to traditional handcrafts. However, a study from 2009 conducted by UNESCO showed that the country tends to diversify its comparative advantages. Indeed, the cultural sector in Morocco is experiencing extremely rapid changes in the last years. For example, Morocco is now recognized as a hub for the cinema industry, with a production that exceeds 10 movies per year, and in the coming years it is about to become an inescapable center for regional and international film production. The boom in the film industry is due to the strong support of the Moroccan Cinematographic Centre (Centre Cinématographique Marocain - CCM) and the Higher Institute of Cinema crafts and audiovisual arts (l'Institut Supérieur des Métiers de l'audiovisuel et du cinéma), but also of the Moroccan diaspora and the diplomatic network of the country.

Similarly, Morocco is the only country in the region to have developed a national program for potential clusters. This program is not specifically dedicated to the cultural and creative sector, but it is currently expanding. It contributes indirectly to the development of the cultural and creative sector, given the structure of clusters that benefit from all productive entities. Indeed, out of the 19 identified clusters, 15 are linked to crafts like carpets, pottery, jewelry, etc., and only 1 is dedicated to heritage.

Similarly the architectural sub-sector is expanding. However, the publishing industry seems to experience stagnation (definitely related to the digital turn). In 2009, this sub-sector occupied 1.8% of the labor force and generated revenue amounting to 370 million USD [United Nations, 2013]. There are currently 20 editors and 4 or 5 distribution companies to 100 libraries scattered throughout the Moroccan territory [UNIDO, 2015].

Many universities and local institutions working in the field of culture and creativity are under the patronage of the Ministry of Culture. Those who are most attractive to youth are: the National Institute of Fine Arts in Tetouan specialized in painting, drawing, sculpture, advertisement and comics; the Institute of Fine Arts in Casablanca; the Higher Institute of Dramatic Art and cultural animation, whose graduates are recruited directly by the Ministry of Culture; National Institute of Archaeological Sciences and Heritage (INSAP). Similarly, the Institute specialized in the film industry in Ouarzazate is a major partnership between VET and the Mohammed V Foundation for Solidarity, and it is one of the best program in Morocco.

As the Moroccan market is changing, universities and training centers and institutions are rapidly evolving. There are also new artistic programs such as the Higher Institute of Cinema crafts and audiovisual arts founded in 2013 (and under the patronage of the Ministry of Communication) and CASAMODA Academy Fashion Design founded in 2009. Therefore, private universities offering cultural and creative programs are almost totally absent in

Morocco. Among the major exceptions, the private University of Marrakesh offers courses including: a specialized Masters in art auction, heritage management, a specialized Masters in multimedia entrepreneurship and project-management, and a Masters in management correlated with design.

Despite the large number of institutes and universities, skill mismatch in the labor market is due to inappropriate educational programs, that are often outdated and that lack dynamism. In general, programs are extended over several years without achieving an adequate transfer of skills. There is also a lack of highly qualified human resources in universities, mainly because teachers are not usually well paid. Finally, higher education institutions are not easily achieving their goals or succeeding with their on-going reforms, due to insufficient public expenditures.

B) ALMP IN THE CULTURAL AND CREATIVE SECTORS IN MOROCCO

The Ministry of Culture was established in 2002 as an autonomous institution. The cultural and creative sectors initially depended on the Ministry of Interior Affairs, and became later on under the responsibility of the Ministry of Sport and Youth. This shows that the interest in culture has recently started to emerge. For example, the artists' status was institutionalized in 2008 through the creation of the "national artist card". Moreover, to date, there is no appropriate intellectual property right framework [Helly, 2014].

Just like Egypt, the budget of the Ministry of Culture for 2015 represented 0.20% of the total expenditure, and this share remains virtually constant in the last 10 years. The expenditures of the Ministry of Culture therefore remain well below the level of the 1% of the national budget recommended by UNESCO. However, the structure of the cultural budget has undergone significant changes: a decrease in the share of operating expenses (including wages and salaries), and an increase in investments and capital expenditures. Thus, in 2005, capital expenditures of the Ministry of Culture in Morocco did not exceed 25% of the total, while they increased to 45% in 2015.

Such restructuring in cultural spending is in line with the reforms advocated by the government aiming at generating economies on operational costs in order to allocate an increased part to capital expenditures and/or to the reduction of the fiscal deficit.

There are currently ALMP in Morocco aiming at improving employability in the cultural and creative sector. Their objectives are the following:

- Improvement of youth employability through facilitating access to a first professional experience (insertion contracts, contract system for socio-occupational integration) and skills training (Idmaj and Taehil program).
- The promotion of self-employment (Moukawalati).
- Intermediation between universities and the labor market.

Once again, these programs are not specific to culture and creativity; when they happen to be related to this sector, attention is given to formal jobs in the private sector. However, the cultural and creative sector is characterized by the predominance of informal jobs. The two main handicaps of the cultural policy in Morocco are therefore insufficient public resources aiming at supporting and developing the cultural sector, and the absence of specific policies that directly target creative jobs. The policy implemented in 2011 by the Ministry of Culture has the following objectives:

- To adopt the "proximity policy" in the cultural field, which is adapted to local/ community level.
- To support and keep pace with innovation and creators, in order to support their action and to improve their status.
- To save the cultural tangible and intangible heritage and to highlight its value.

- To encourage diplomacy and cooperation on the international cultural scene.
- To incorporate good governance and better regulations within the cultural Affairs. Cultural policy is decentralized given the specificities of each region. Thus, there are 16 directorates in Morocco working for the establishment of festivals in each region, aiming at promoting art and culture and helping local economy of culture to benefit from the positive impact of festivals. Similarly, the Ministry of Culture manages 7 exhibition halls. The priority is currently given to the creation of the National Museum of Archaeology and Earth Sciences as well as the National Higher Institute of Music and Dance.

C) VIEWS ON SELF-EMPLOYMENT AND ENTREPRENEURSHIP IN MOROCCO

The Moroccan Labor law of 2003 represents the general framework for employment, but special laws were implemented, specifically targeting artists, given their specific needs for contracts guarantees and rights over their production. Since 2003, the law gives Moroccan artists the right to benefit from social benefits (social security and health) and they are entitled to a national artist card for this purpose. The Ministry of Culture collaborates with several other departments in order to support the cultural and creative sectors. The Ministry of Education is responsible for the teaching of Art in schools and there are currently 500 music teachers serving the entire Moroccan territory. Moreover this ministry develops programs for technical education on the request of the directors of each establishment, and supports specialized Masters in Art and culture through several universities, as mentioned previously. The Ministry of Youth and Sports manages approximately 500 youth centers across the country, however they are for the majority inactive. The Foreign Ministry provides funds for specific cultural projects such as the Moroccan cultural weeks abroad or other international cultural events, by providing logistical support: airline tickets, lodging, restaurants, etc.

In 2007, the Mutuelle Nationale des Artistes was created under the patronage of the Ministry of Culture. It aims mainly at defending labor rights of artists and at improving their social situation. Indeed, the civil society is increasingly involved in the defense of cultural causes. The dialogue between civil society and the state was initiated in order to jointly work on an effective global strategy and on a more participative cultural policy (e.g. the program of the general forum dedicated to Morocco's culture, managed by Jedour). That being said, the number of agents and organizations working in the cultural field is rapidly increasing in Morocco. However the implemented policies are not yet intended to a sustainable cultural development, given the high dependence on international funds. Investment in education is in itself the most effective way to counter this tendency, by improving the quality of education within universities and VET, and creating stronger links between the labor market and universities.

D) CONCLUSION: MAJOR OBSTACLES TO EMPLOYABILITY IN MOROCCO AND SOME RECOMMENDATIONS

The cultural scene in Morocco faces several barriers that prevent sustainable cultural development:

- Moroccan universities are still far from applying the skills approach and have little connection with private companies and the labor market. The education and training of artists is a major problem, given the strong skill mismatch, and the absence of prospective studies or anticipation of the market needs, in a context of a rapid evolution of the Moroccan market.

- The national program of clusters does not directly target the cultural and creative sector. It indirectly benefits the companies in the sector, and may play in the future an increased role in job creation. For example, the mono-artisans structure dominates the art crafts sub-sector, which is one of the largest in the country. This limits the export capacities of this sub-sector while one can expect that an increase in exports may lead to an expansion in the structures of these micro-firms and to increased employment.

- The absence of policies that directly target the creative jobs and insufficient public funds that support the creative sector are therefore the two main handicaps of the cultural policy in Morocco. On one hand, the ALMPs aiming to improve the employability do not target the creative and cultural sector in particular. On the other hand, the budget of the Ministry of Culture for 2015 represents 0.20% of the national budget, and this share has remained virtually constant in the last 10 years. As in Tunisia, the cultural funds are unstable and remain subject to drastic changes: any political or economic shift can lead to abrupt budget cuts that negatively affect the cultural sector and budget.

VI CONCLUSION AND RECOMMENDATIONS

Egypt remains the largest exporting country of cultural goods and services in Africa, followed by South Africa, Tunisia and Morocco. Tunisia is the country experiencing the fastest expansion in its exports (an average of 16.97% per year between 2003 and 2008) [United Nations, 2010], which is certainly due to the fact that the Tunisian budget devoted to culture is higher than that of the other three countries in our study. This positive correlation between public expenditures and export in Tunisia is due to the fact that the Tunisian government is the only one in the region to respect the UNESCO recommendations by dedicating around 1% of its annual budget to culture, while other countries are far from this threshold (around 0.25%, cf. Study of budgets).

However, the sector of culture and creativity in AMC suffers from several structural weaknesses:

1. A funding problem: public funds are often limited and almost never offer practical opportunities for a sustainable cultural development. The instability of international funds aggravates this problem, as any political and economic shift leads to budget cuts and disturbs the local cultural agenda.
2. Barriers to entry in the sector: significant barriers to entry prevent the diversification of the supply. Indeed, the main income for creators comes from sales: new businesses wishing to enter the market depend on state subsidies, and are struggling to break into well- protected markets. These same barriers prevent young or new independent artists to enter segments that are well protected by professional renowned artists already established in the market.
3. The informal economy of culture: heavy reliance on informal cultural system excludes many creators from formal segments of the labor market. Thus, many professionals (including musicians, artisans, designers, etc.) are crowded-out from the official channels of funding: they pay lesser taxes, as they work outside the declared channels of the formal economy, while receiving lesser or no subsidies.
4. Lack of major institutional players: informality of the political economy of creativity is mainly explained by the limited presence of the specialized cultural institutions. The number of major cultural agencies, museums, studios, galleries, is insufficient. Thus, collectives, micro-businesses, associations, and clubs are the main actors of the cultural scene. Similarly, the importance of the local art scene is a major asset for creative young people, but the importance of its local action is offset by low synergy with the international scene.
5. Weak intellectual property rights: the failure of the intellectual property does not encourage the artistic and cultural production (though they facilitate access and reduce the problems of consumption). Even in the north of the Mediterranean countries, the intellectual property right is a major challenge to the development of creative industries. Workers in the cultural and creative sector should be able to expect to live from their work, from revenues protected by a system of rights property and copyright. This is not the case in the AMC, where the lack of protection of intellectual property is often cited as a major obstacle facing the development of cultural and creative industries, as much as the lack of public grants and private investment.
6. The narrowness of the local art scene: the chain value of creation, production, distribution and consumption is almost entirely generated locally. This is an

enormous challenge for independent artists and creators (musicians, producers, filmmakers, directors, editors, etc.) who lack institutional support and are excluded from the circuits of major distributors.

7. The limitations in terms of consumption: slow growth of disposable income limits consumption of cultural goods and services, despite the recent changes in the consumption habits of the middle class that remains the first clientele for local cultural products.

In conclusion, one should not build unrealistic expectations from the cultural and creative sector, which alone cannot solve problems of unemployment, poverty and inequalities in the AMC. Rather, it is through an in-depth analysis of products that are produced and consumed in connection with underlying economic dynamics, that AMC countries will insure better adequacy between skill supply and professional needs of the cultural sector. Reforms in different sectors are needed, and the educational reforms should be supported by a coherent employment strategy and a global view of a sustainable cultural development:

- Improving the attractiveness and the quality of VET: while VET strategies are approved, there is a need to accelerate the implementation of reforms and promote them by involving the private sector and increasing their attractiveness among young people. In order to do so, policymakers need to develop more participative methods, while designing and implementing VET strategies. This will require three simultaneous actions: a higher investment is needed; better governance, especially better coordination between ministries (the Palestinian case and the Moroccan case are examples of good practices); specific policies should target the cultural and creative sector and its specific needs, and not merely focus on commercial and industrial trainings and programs. Synergy between Ministries of Education, Labor and Culture seems to be necessary in order to achieve better governance, and better VET quality.
- Better preparedness of higher education institutions are needed in order to reduce the skill mismatch: a strong mismatch between the supply of skills and the market needs is a major weakness affecting all economic sectors, and not only creativity and culture. Universities and vocational centers should adopt the "competency approach" and implement well-defined curriculum. Certified programs should define the professional knowledge expected from freshly graduated students in coherence with the market needs. This requires them to cooperate more with private companies and other certified programs, in a context of a lack of national qualification framework for most cultural occupations. More studies are needed in order to tailor the skill supply to the market needs, and it is recommended that the educational system itself participates or produces such prospective studies and anticipation of future needs. Indeed, reforms of the skill supply require tools to identify needs, and prospective studies and forecast for the labor market in order to anticipate future skills needs.
- The budget of ministries of culture should be increased and restructured: the cultural budget should be increased in volume and proportion, at least to meet the recommended 1% of the national budget, as advised by UNESCO. More transparency is needed, in order to assess the efficiency of public expenditures and to adjust the cultural policy. The structure of the cultural budget should

also be adjusted, by increasing public investments, public grants and the capital expenditures, and decreasing the functional expenditures (as in the Moroccan case).

- Better synergy between the local and the international scene: the local cultural policy should also contribute to better synergy with the international scene, by supporting the international cultural action, and by dedicating more funds for cultural action abroad. As in the case of Morocco and Tunisia, these interactions between local artists and European or immigrant artists are inducing rapid changes in the local cultural scene, and in return, the diaspora is contributing to the cultural development through skill transfer and fund raising. Finally, local public entities need a better coordination with international donors in order to ensure a more coherent cultural action and a more sustainable cultural development.
- Better inclusive policies are needed for better jobs in the creative sector: Since labor markets are suffering from high segmentation and inequalities, cultural development depends on other reforms, such as social policies aiming to protect diversity and equality: especially fighting Gender inequalities (the image of the female artist is still suffering from social and moral prejudices), regional disparities and poverty features (the majority of artists are suffering from precarious conditions).
- Need to improve the attractiveness and the quality of VET
- Better prepared higher education institutions in order to reduce the skill mismatch
- The budget of ministries of culture should be increased and restructured 4- Need for better synergy between the local and the international scene 5- Better inclusive policies are needed for better jobs in the creative sector

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VIII

APPENDIX 1: CREATIVE INDUSTRIES AND EMPLOYABILITY IN THE MENA REGION

1- In your opinion, do education systems in your country produce employable graduates?

2- Name 3 strengths in the education system that help fresh graduates find jobs in the cultural professions.

a

b

c

3- Name 3 weaknesses in the education system that prevent fresh graduates from finding jobs in the cultural professions.

a

b

c

4- Name 3 obstacles to the employability of youth in the cultural professions

a

b

c

5- In your opinion, what are the 3 cultural professions that are mostly needed today by the potential employers in your country?

a

b

c

6- In your opinion, what are the 3 majors in the cultural field that attract most of the undergraduates?

a

b

c

7- Name 3 competencies or skills that fresh graduates lack?

a

b

c

8- Name 3 factors that influence cultural professions today in your county and that require adjustment from the education system and/or from policy-makers

a

b

c

9- In your opinion what would be the impact of the above factors on the cultural professions and on the cultural and creative sectors?

10- Name 3 cultural professions emerging and flourishing in your country.

a

b

c

11- In your opinion, are the professions of artist and cultural practitioner recognized as real ones?

12- Do current labour policies tend to promote cultural professions? If not, what would be the recommendations to reverse this situation?

13-How to promote self-employment for those who are working in the cultural field?

14- What role could the State play in increasing employability opportunities, particularly for youth working in the cultural field?