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1. Introduction

1.1. Main questions

In the last fifteen years, widespread attention has been given in public policy to promoting the creative industry. The creative industry is more and more seen as an engine of economic growth, employment creation and innovation. Both the sector as such and its contribution to innovation and growth in other sectors is increasingly considered as crucial to fostering a dynamic economy and labour market. In the Netherlands this is the case as well and in 2011, the creative sector was assigned the label of "top sector", along with eight other sectors. The top sectors are deemed particularly promising or important for future economic development and receive state support to live up to these expectations.

The creative sector is also often seen as a significant model of work and employment, with an important role for project-based work, portfolio careers, temporary collaborations, self-employment and entrepreneurship (Kenney and Zysman 2016; Florida 2002; Mathieu 2012). At the same time, there are mixed views on the extent to which the creative industry is exemplary where job quality is concerned (Eikhof and Warhurst 2013; Keune *et al.* 2018; Neff *et al.* 2005). On the one hand, those who work in the creative industry is generally strongly intrinsically motivated, full of passion for their work that they often consider a hobby as much as work. On the other hand, work in the creative industry is often precarious and insecure, with relatively low pay, high volatility and inadequate access to social security. Hence, it is argued to present serious problems in terms of job quality.

The relatively high prevalence of jobs with limited job quality is then argued to be linked to the way interests in the sector are defined and represented. One is that it has come to be considered as an inescapable characteristic of creative work and a price that has to be paid to be able to do this type of work (Umney and Krestos 2015). The highly intrinsically motivated creatives, the argument goes, are willing to compromise on their wages and working conditions in exchange for the opportunity to do the work they aspire to do. The other is that substantial parts of the creative industry operate outside the sphere of influence of traditional collective industrial relations, weakening the bargaining position of workers and freelancers (Keune *et al.* 2018; de Peuter 2014). De Peuter (2014) does show that there are certain new forms of interest representation emerging in the creative industry but it remains to be seen to what extent they manage to improve job quality.

In this paper, we will present a study of interest representation and job quality in the creative industry in the Netherland. The Netherlands can be characterised as a neo-corporatist system (sometimes referred to as the polder model) in which trade unions and employers' organisations play an important role in the economy and society through national deliberative institutions, social pacts and a high coverage of collective agreements, stable at around 80% since the late 1970s (Keune 2016; Visser and

Hemerijck 1997). Indeed, the quality of work of the vast majority of workers is regulated to an important extent through (mainly sectoral) collective agreements.

In this paper we discuss to what extent these traditional industrial relations actors and institutions play a role in the creative industry in the Netherlands and to what extent collective interest representation is absent or new types of collective interest representation can be observed. Also, we analyse the state of play of job quality, the possible problematic aspects thereof and the way these are linked to (the absence of) interest representation. The paper discusses the creative sector as a whole but focuses mainly on two subsectors where traditional industrial relations play a limited role: the graphic design and gaming industry. The first sector is an older one that underwent rapid and thorough changes due to profound technological innovation (Meggs and Purvis 2016). The gaming industry, on the contrary, is an emerging sector that registered steep growth in recent years.

This study is part of a larger project, IR-CREA, coordinated by the University of Florence and involving the Institute for Employment Studies (FAOS) from the University of Copenhagen and the Institute for Advanced Labour Studies (AIAS) from the University of Amsterdam. Three national studies were performed as well as a comparative analysis of the three cases. For more information, see: www.ties-unifi.eu/ircrea.

1.2. Methods and cases

1.2.1. Data collection

To describe the creative sector in general and the graphic design and games sectors in particular, we first collected statistical material from the Central Bureau of Statistics (CBS) as well as data from sectoral organisations like the Dutch Games Associations DGA. As a next step, semi-structured interviews were held with leading figures of organizations representing or affecting the creative sector at large or the graphic design industry or games industry in particular at a national level, i.e. professional organizations, trade unions, employers' organizations, the ministry of economic affairs and organizations set up in the context of the top sector policy (of which the creative sector is part). After the national level interviews were conducted, one of the cities with a very lively creative industry, Utrecht, was selected as a case to study the creative industry at the local level. Within Utrecht, we interviewed the municipality, art schools and universities as well as a local game hub, i.e. the principal institutions that play a role in supporting and shaping the local creative industry.

Finally, we interviewed a number of employers, employees and freelance workers[1] working in the graphic design- and games industry in Utrecht. Interviewees were found through existing contacts and snowball sampling. Here we also included some companies from in Amsterdam because the bigger game companies are located in Amsterdam and the sample would otherwise have been too biased towards smaller

[1] When we mention freelance workers, we mean all different kinds of self-employed workers.

organizations. Table 1.1 provides and overview of the interviews at each level: national, local and company/freelance. Table 1.2 gives a more detailed overview of the interviews held at national and local level.

Table 1.1 – Number of interviews

	Overall creative industries	Graphic design	Games
National level	10	–	–
Local level	5	–	–
Workers' level:			
• *Employers*	–	*4*	*6*
• *Freelance*	–	*5*	*4*
• *Employees*	–	*3*	*3*

Table 1.2 – Interviews at the institutional level

	Type of organisation	Industry
1	Top sector policy related organization	Creative
2	Professional organization	Graphic design
3	Employers' organization	Graphic design
4	Trade union	Creative
5	Professional organization	Games
6	Trade union	Creative
7	Professional organization	Creative
8	Top sector policy related organization	Creative
9	Ministry	All
10	Breadfund	All
11	Educational institute	Games
12	Service organization	Games
13	Educational institute	Graphic design
14	Educational institute	Games
15	Municipality	All

The interviews lasted between 40 and 95 minutes and were recorded with the consent of the interviewees. Afterwards, the interviews were transcribed ad verbum. Where possible and consented by the interviewee, these interviews were held in English to allow for the participation of a member of the coordinating partner (the University of Florence). Whenever an interviewee felt uncomfortable having the interview in English, the interview was conducted in Dutch by the Dutch members of the research team.

1.2.2. Data analysis

The interviews were analysed using MaxQDA. First, a broad coding structure was set-up outlining the main categories of interest to the study. This structure served as a framework to guide the open coding phase and which was filled with codes emerging from the data. Next, open coding of the interviews was applied to allow topics to emerge from the data given the explorative nature of the study. After coding of the first three interviews, the coding was discussed within the team of researchers and adjusted to the issues emerging. After this first round of coding, all codes were checked internally to ensure consistency. After the open coding was finished, a phase of axial coding was entered, structuring and determining the codes given in the open coding phase. This resulted in the code tree that can be found in Appendix 1.

1.4. Structure of the report

This report exists of three parts. In the first part (Chapter 2) we will discuss the creative industry in the Netherlands. Next, we will zoom into the two subsectors. In Chapter 3, we focus on the graphic design industry and, in Chapter 4, on the games industry. We end with conclusions (Chapter 5).

2. The creative industry in the Netherlands

This chapter discusses the development of the creative industry in the Netherlands. First, it addresses how the creative sector is defined and what its basic features are in terms of size and contributions to the economy. Second, we zoom in on the city of Utrecht as the focus of our case studies. Third, the public policies concerning the creative industry are outlined. Fourth, interest representation in the creative industry is discussed, followed by a review of the social security available for (different types of) workers in the industry. We end with a discussion of the factors affecting interest representation and social security according to the actors active within the industry.

2.1. Defining the creative industry in the Netherlands

The creative industry is an umbrella term under which many different sub-industries can be found. However, which sub-industries are included varies between countries, and even within the same country different actors often use different definitions, which is also the case in the Netherlands (Braams 2011).

In order to analyse the creative industry in the Netherlands, the Statistical Office[2] of the Netherlands (CBS) identifies 4 sub-sectors (CBS 2017):

1. *Creative Business Services*: e.g. Product Designers, Architects, Fashion Designers, Digital Designers, Graphic Designers, Photographers, Service Designers, Design Researchers, User Experience Designers;
2. *Media and Entertainment*: e.g. Publishers, Game Developers, Film, TV and Radio Makers, DJs, Vj's;
3. *Arts:* e.g. Performing arts, Creative arts;
4. *Cultural heritage:* e.g. Museums, Historical sites.

[2] www.cbs.nl.

Table 2.1 shows all the categories that are part of the four sub-sectors distinguished by this definition of the CBS together with their SBI[3] code. The third column shows possible other sources of data besides the CBS data that can be used to identify the workers belonging to this sub-category. The table shows that not all categories belonging to a certain subsector can be identified, because they do not all have their own unique SBI-code. However, for those categories alternative data sources are available.

Table 2.1 – The sectors and subsectors of creative industry in the Netherlands

Sector	Sub-sector	SBI 2008	Other source of data
Creative business services	Public relations and communication activities	70.21	
	Architecture	71.11	
	Advertising agencies	73.11	
	Industrial design	74.10	
	Digital Agencies		DDA member list
Media and entertainment industry	Publishing activities	58	
	Motion picture, video and television programme production, sound recording and music publishing activities	59	
	Photography	74.20.1	
	Music Companies Publishers of: - audiovisual content on digital and on-line media - games and other interactive software		NVPI member list
	Game Industry		DGA member list
Arts	Practice of Performing Arts	90.01.1	
	Producers of Performing Arts	90.01.2	
	Support activities to performing arts	90.02	
	Artistic creation	90.03	
Cultural heritage	Cultural learning and archives activities	91.01.9	
	Museums activities	91.02.1	
	Operation of historical sites and buildings and similar visitor attractions	91.03	

NVPI – Dutch Association of Producers and Importers of Sound Carriers (www.nvpi.nl)
DGA – member list of Dutch Games Associations (www.duchgamesassociation.nl)
DDA – Dutch Digital Agencies (www.dutchdigitalagencies.com)

Source: CBS (2017: 19).

2.2. The size of the creative industry and its sub-sectors

2.2.1. Contribution to the economy

The creative industry contributes 2.0 percent of the value added in the Dutch economy, which equals a total of 12,043 million euros in 2015 (see: Table 2.2, below). Of

[3] The Standard Industrial Classification (SBI) is a classification of the economic activities that CBS uses to classify the business units whose main business activity is. The SBI has five levels. The first four digits of the SBI, with few exceptions, are the same as NACE Rev. 2. The fifth degree is a further Dutch differentiation. NACE and SBI are updated about once every 15 years. The latest rating available is SBI.

the subsectors making up the creative industry, the media and entertainment industry is the largest contributor (4,648 million), followed by creative business services (4,079 million), arts (2,815 million) and cultural heritage (500 million). For 2016, it is estimated that the value added by the creative industry is 12,471 million euros (2.0 percent of the total). The product value of the creative industry in 2015 was 1.9 percent (24,795 million) of the total of the Netherlands. For 2016, the value is estimated to be 25,633 million (see: Table 2.3, below).

Table 2.2 – Value added (base price), creative industry and sub-sectors, 2010-2015

	2010		2011		2012		2013		2014		2015	
	Mln €	%	Mln €	%	Mln €	%	Mln €	%	Mln €	%	Mln €	%
The Netherlands	**567,757**	**100.0**	**579,590**	**100.0**	**583,832**	**100.0**	**588,535**	**100.0**	**597,414**	**100.0**	**614,986**	**100.0**
Creative Industry	**10,957**	**1.9**	**11,043**	**1.9**	**11,194**	**1.9**	**11,012**	**1.9**	**11,491**	**1.9**	**12,043**	**2.0**
Art	2,270	0.4	2,388	0.4	2,422	0.4	2,489	0.4	2,632	0.4	2,815	0.5
Cultural heritage	400	0.1	414	0.1	430	0.1	442	0.1	468	0.1	500	0.1
Media and entertainment industry	4,737	0.8	4,573	0.8	4,532	0.8	4,430	0.8	4,471	0.7	4,648	0.8
Creative business services	3,549	0.6	3,667	0.6	3,110	0.7	3,651	0.6	3,920	0.7	4,079	0.7

Source: CBS, 2017.

Table 2.3 – Product Value (base prices), creative industry and sub-sectors, 2010-2015

	2010		2011		2012		2013		2014		2015	
	Mln €	%	Mln €	%	Mln €	%	Mln €	%	Mln €	%	Mln €	%
The Netherlands	**1,178,924**	**100.0**	**1,238,414**	**100.0**	**1,255,794**	**100.0**	**1,253,792**	**100.0**	**1,267,298**	**100.0**	**1,279,667**	**100.0**
Creative Industry	**22,175**	**1.9**	**22,735**	**1.8**	**22,465**	**1.8**	**22,075**	**1.8**	**22,636**	**1.8**	**24,795**	**1.9**
Art	3,993	0.3	4,208	0.3	4,216	0.3	4,336	0.3	4,526	0.4	4,782	0.4
Cultural heritage	705	0.1	730	0.1	749	0.1	771	0.1	804	0.1	850	0.1
Media and entertainment industry	9,559	0.8	9,476	0.8	9,171	0.7	8,993	0.7	9,084	0.7	10,259	0.8
Creative business services	7,918	0.7	8,322	0.7	8,328	0.7	7,975	0.6	8223	0.6	8,905	0.7

Source: CBS, 2017.

2.2.2. Number of companies, employees and freelance workers

In the 2015, there were 156,235 enterprises (including the self-employed) registered belonging to the creative industry, i.e. 10.1 percent of the total for the Dutch economy (see: Table 2.4). The arts represent a considerable part of the overall creative industry, with 65,350 companies, followed by creative business services (54,740), media and entertainment (34,780) and cultural heritage (1,365). It has been the fastest growing sector in the Netherlands for several years now, with an average of 2.3 percent growth per annum over the period 2005-2015 compared to a national average of 0.4 percent.

Table 2.4 – Enterprises (including self-employed) by sector and sub-sector, 2010-2015

	2010	2011	2012	2013	2014	2015
The Netherlands	**1,277,280**	**1,333,440**	**1,374,350**	**1,395,950**	**1,460,550**	**1,530,240**
Creative Industry	**119,205**	**128,475**	**134,600**	**138,010**	**147,085**	**156,235**
Art	48,800	5,2705	55,240	57,460	61,560	65,350
Cultural heritage	1,275	1,305	1,320	1,310	1,350	1,365
Media and entertainment industry	25,805	27,910	2,9505	30,610	32,885	34,780
Creative business services	43,330	46,565	48,540	48,630	51,290	54,740

Source: CBS, 2017.

In 2015, there were 109,580 registered employees in the creative sector (see: Table 2.5). Their distribution among the various sub-sectors follows a different trend to that of enterprises: creative business services are the largest sector in terms of employees with 40.9 percent of the total number of employees within the creative industry, followed by the media and entertainment industry (37.1 percent), art (13.4 percent) and cultural heritage (8.6 percent). Over the last five years, the total number of employees in the creative industry has declined with 7.8 percent. Most of this decline can be attributed to the art sector (-4.5 percent), the media and entertainment industry (-2.7 percent) and creative business services (-1.8 percent).

Table 2.5 – Employees by sector and sub-sector, 2010-2015

	2010	2011	2012	2013	2014	2015
The Netherlands	**7,479,140**	**7,582,270**	**7,514,940**	**7,392,330**	**7,376,100**	**7,453,250**
Creative Industry	**118,870**	**116,150**	**113,930**	**107,630**	**110,930**	**109,580**
Art	15,410	15,660	14,760	13,850	14,330	14,710
Cultural heritage	9,000	9,010	9,090	9,080	9,180	9,380
Media and entertainment industry	46,820	46,940	46,950	44,400	41,750	40,630
Creative business services	47,640	44,540	43,130	40,300	45,670	44,860

Source: CBS, 2017.

In 2015, a total of 112,660 freelance workers could be found in the creative industry, which equalizes about 10 percent of all freelance workers in the Netherlands. The distribution of freelance workers (see: Table 2.6, below) among the various sub-sectors shows that the art sector contains most freelance workers with 43 percent) of all freelance workers in the creative industry, followed by creative business services (36.1 percent), media and entertainment (20.8 percent) and cultural heritage (0.1 percent). It is characteristic of the creative sector that there are more or less the same number of employees and freelancers.

Studies related to the field are increasingly popular and also the number of relevant studies available is rising. This has resulted in an increase of graduates in relevant areas of 47 percent between 2008-09 and 2014-15 (see: Table 2.7, below).

Table 2.6 – Self-employed by sector and sub-sector, 2010-2015

	2010	2011	2012	2013	2014	2015
The Netherlands	**959,220**	**1,004,200**	**1,029,410**	**1,056,870**	**1,033,060**	**1,126,320**
Creative Industry	**87,410**	**94,030**	**98,230**	**101,040**	**100,480**	**112,660**
Art	37,330	40,090	41,290	43,370	43,520	48,430
Cultural heritage	120	120	120	130	130	140
Media and entertainment industry	17,790	19,190	20,040	20,820	20,710	23,430
Creative business services	32,170	34,630	36,780	36,720	36,110	40,660

Source: CBS, 2017.

Table 2.7 – Graduates in fields related to the creative industry, 2008-2015

	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015
The Netherlands	**286,400**	**328,770**	**310,790**	**327,830**	**317,200**	**315,599**	**311,941**
Creative Industry	11,630	12,940	14,260	15,400	15,080	15,726	17,103

Source: CBS, 2017.

2.3. Local context: the case of Utrecht

Utrecht is a central location for the creative industry. It is the third biggest area in the Netherlands in terms of net sales for the graphic design sector. Also for the games industry, Utrecht is the third largest area, after Amsterdam and Rotterdam with 262 jobs and 65 -mainly small- game companies in 2015 (Koops 2016).

Our interviewees argued that creative "hotspots" are important locations for the local creative industry. Within these buildings or sites, creatives of different backgrounds find office spaces and meet each other. The municipality of Utrecht is mainly supporting the creative sector through providing such hotspots. In addition, they support people that want to start their own company and provide subsidies, for example to the Dutch Game Garden. The Dutch Game Garden provides a unique incubator space for starting game companies.

The presence of an educational programme in a certain creative direction promotes the presence of the industry at a local level: many graduates stay where they studied and for example start their own company in this location. One of the interviewees connected to a graphic design educational programme in Utrecht mentioned that between 50 and 60 percent of the graphic design companies in Utrecht have founders originating from their educational programme. Also the person interviewed from one of the games educational programmes mentions that the presence of universities and universities of applied sciences offering games education programmes is an important reason why Utrecht is one of the cities in the Netherlands with a vivid games industry. Many of their alumni have stayed in Utrecht. Moreover, the presence of the Dutch Game Garden stimulates staying in Utrecht.

> *So there are three large schools that have game programs here, and of course they start producing graduates and they get into the industry and they like to remain here because there is already so much here.*
> **Representative of a professional organization, graphic design industry**

The interviewees in the graphic design industry and the games industry expressed a slightly different perspective on the role of the local context. Those of the graphic design industry mentioned the importance in terms of customers: they often serve local customers. Therefore, they can often find their own clientele also when they are located in smaller communities. The games industry depends less on the local context for customers. Central actors in the industry mention that it does not really make sense to divide a small industry as the games industry in regions but rather consider it at a national level. Especially, because they often do not serve local customers but customers from all over the Netherlands and all over the world. Still, in both industries interviewees mention that many of the successful companies eventually move to Amsterdam, as this city has the reputation of being the creative hub. This resulted in the games industry in a segregated landscape: game companies in Utrecht are mainly smaller companies and Indie game developers. The larger companies tend to be located in Amsterdam.

> *Graphic designers … so they can be servicing local customers. They don't have to be stationed in a big city. They can be in their own region, and just make their corporate identities for the grocery store and the…whoever. And that is very attractive for clients. I think that is a very important trademark because clients do want to have somebody, and have a face-to-face conversation before they decide or while they develop.*
> **Representative of a professional organization, graphic design industry**

2.4. Public policy initiatives: the Top Sector Policy

Creativity plays a central role in stimulating economic growth in cities, regions and advanced capitalist economies in general. If it is to foster economic growth, creativity has to induce market value via innovation. The creative industry is an essential element of government policy and innovation strategies (Chaston and Sadler-Smith 2012). And it is often pictured as one of the "success stories of the new century" (Bilton 2007). According to the Nations Conference on Trade and Development (2008) the emergence and the growth of enterprises in the creative sector is a potentially important source of new employment in the digital economy.

The Dutch government also considers the creative industry to be a driver of growth and innovation. In 2011, the first cabinet Rutte designated nine "top sectors" to be central to the Dutch economy: the so-called Top sector policy.[4] The creative industry was chosen as one of these nine priority sectors. Within this context, the government

[4] The three government departments involved are the Ministry of Economic Affairs, the Ministry of Foreign Affairs, and the Ministry of Education, Culture and Science.

stated that it wants the Dutch economy to become the most creative one by 2020 for its potential cross-over effects and the ensuing creation of value.

There were several organizations set up in relation to the top sector policy. The *Dutch Creative Council* (DCC) was established in 2012 as an independent strategic and consultative body for the industry. The *Top Team Creative Industries* is the daily board of the Dutch Creative Council and is supported by a secretary of the Ministry of Economic Affairs. It has four members, one industry representative, one from academia, one policy maker and one innovative entrepreneur from the industry[5]. It was set up by the Top Team in response to a desire from the industry to have a representative body towards the government. Initially the DCC was envisioned as a representative body where the *Top Team* acted as the steering committee, but it has been recently decided that the council will have more of an advisory role whereas the Top Team handles the day to day business.

To encourage the development of knowledge and to promote innovation, the *Top Team Creative Industries* has a foundation called *Click NL*. Within this body, research, business and the government find each other and draw up an innovation agenda for the sector. In addition, they link researcher to creative professionals and entrepreneurs in order to stimulate innovation.

The interviewees indicated that at the start of the top sector policy, it was difficult to identify the relevant stakeholders in the industry to discuss on how to design and implement policies to support the sector. The policies – such as funding research activities and subsidies– were in need of a counter-part in the sector. However, the sector itself did not necessarily identify in terms of being the creative sector: it was mainly a collection of smaller industries with their own identities. These smaller industries were represented by professional organizations (or not), but the creative industry at large did not have any representative bodies at the time. The result is that the early attempts of organization in the creative sector as a whole where implemented top down, emerging from the governmental initiative to create a policy domain. Only over time the sector has been developing an identity as creative sector.

2.5. Interest representation in the creative industry[6]

Apart from the organizational structure set up in the context of the top sector policy, there are several other important actors involved on an institutional level within the creative industry. This section presents an overview of those actors and the actions and support they provide to the sector.

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[5] http://www.creative-council.nl/topteam/topteam, 8-1-2018.

[6] Interest representation in the graphic design industry and the games industry are discussed in more detail in Chapters 3 and 4.

2.5.1. Trade Unions

Until recently, FNV Kiem was the section of the FNV (the largest trade union in the Netherlands) that focused on organizing the creative industry. Recently, it has split itself into two divisions. Part of their constituency changed into the FNV division *FNV media and culture* and another part established a new fraction with the name Arts Union for Creatives (*Kunstenbond*). FNV Media and Culture focuses on specific sub-sectors in the creative industry, namely graphic and pre-publishing, packaging, audio visual, publishing and classical music[7]. Important in this context is that they sign several collective agreements in these subsectors, both sectoral level agreements and company level agreements[8]. Also, it is trying to increase its visibility on the work floor and at the local and regional level, while at the same time investing in building international coalitions because of the increasingly international character of the work.[9] In addition, members can make use of the general services provided by the FNV, such as legal support, career coaching and tax support. They also provide help when workers lose their job, need to re-integrate or fall ill for a longer period of time[10].

The *Kunstenbond* explicitly focuses on "all creatives in the Netherlands": employees, freelance workers and employers together. Hence, they are not a traditional trade union focusing only on the interests of employees. They have two main goals: 1) creating the circumstances to reach a fair income for all creatives, 2) creating networks and expanding the reach of the creative industry in other sectors. In order to reach these goals, they provide, among other things, the following services: sign several collective agreements in the creative industry[11], lobby at a national level, provide tax support, provide an example contract to be used for assignments, contract screening and advise, support in contract negotiations, a fee checking tool, a money collection service (when customers do not pay), support in starting a works council, support and information for (starting) freelance workers, information about starting your own company, information about copy right and support in running a company[12]. This means that the Arts Union for Creatives provides many more services than trade unions generally provide to their

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[7] https://www.fnv.nl/sector-en-cao/alle-sectoren/media-en-cultuur/over-fnv-media-en-cultuur/, 7-12-2017.

[8] These are the collective agreements signed by FNV Media and Culture: AT5 Groep, Audax, Ballet Orkest, Bioscoopbedrijf, BTU, Centraal Boekhuis, Dutchview, Ericsson, Fujicolor Benelux, Grafimedia, Huhtamaki, Heuvelman Sound Vision, Kartoflex, Lensen Toppoint en Merlinex Pen, Metropole Orkest, Mondi Heerlen, Mondi Maastricht, Nederlands Instituut Beeld en Geluid, NEP Broadcast Services, Omroepbestel, Orkesten NL, Remplacanten Nederlandse Orkesten, Reprografie, RTL Nederland (source: https://www.fnv.nl/sector-en-cao/alle-sectoren/media-en-cultuur/caos-media-en-cultuur/, 7-12-2017).

[9] Source: https://www.fnv.nl/sector-en-cao/alle-sectoren/media-en-cultuur/over-fnv-media-en-cultuur/, 7-12-2017.

[10] https://www.fnv.nl/lidmaatschap/voordelen/, 7-12-2017.

[11] These are the collective agreements signed by the Arts Union for Creatives: Cliniclowns, Nederlandse Poppodia en festivals, Kusteducatie, Nationale Opera en Ballet, Nederlandse Orkesten, Orkesten, Paradiso, Remplacanten, Toneel en dans, Vrije Theaterproducenten, Nederlandse Podia (source: http://www.kunstenbond.nl/producten, 7-12-2017).

[12] http://www.kunstenbond.nl/producten, 7-12-2017.

members, mainly because they also target freelance workers and employers besides employees.

CNV Vakmensen is a trade union with 135,000 members. It is part of the larger CNV union confederation (the second-largest after the FNV) and covers, among many others, the graphical industry. The CNV does not have a specific focus on the creative sector. Rather, parts of the creative sector are organized in departments, for example "culture and art" that provide additional services and information next to the services provided by CNV Vakmensen. Not all sub-sectors that are regarded as part of the creative sector according to the definition used in this report have their own department. Workers of those sectors can become a general member of CNV Vakmensen. Freelance workers can become a member of the department for freelance workers. There are also a number of other, much smaller, trade unions in the Netherlands. At this moment, those organizations do not have a specific focus on the creative industry.

Next to these larger unions, there are a number of trade unions that cover certain subsectors of the creative industry. A good example is the Dutch Association of Journalists that organises journalists in all types of media (TV, newspapers, magazines, press agencies, etc.) and negotiates collective agreements for them.

At the same time, in many parts of the creative sector, trade unions play no or just a minor role. This is for example the case in the graphic design sector and the games sector, the two sectors that will be discussed in Chapters 3 and 4.

2.5.2. Employers' organizations

Several sub-sectors of the creative industry have employers' organizations that negotiate the earlier-mentioned collective agreements for subsectors of the creative industry. However, this is not the case for all: within several sub-sectors the employers are not organized which by definition also means that there are no collective agreements in these sub-sectors There is no general employers' organization for the overall creative industry in the Netherlands tying the interests of employers together. Sub-sector employers' organizations and individual employers in the industry can, however, become a member of the national level employers' organizations.

2.5.3. Other initiatives

The *Federation Dutch Creative Industries (FDCI)* was founded in 2010 as an "informal association" and was formalized in 2014. The basis for the federation was a "yellow card" the Dutch government announced for the creative industry for their lack of organization in 2009. The government wants the sector to be organised to be able to work with it in the context of, for example, the top sector policy. In order to improve the organization of the sector, several professional organizations joined forces and formed an umbrella organization which became the FDCI. Nowadays, it is an overarching organization, representing nine professional organizations in the creative industry. By forming such an umbrella organization, the professional organizations have a combined voice as the "creative industry" and have more weight towards the government and other relevant players. The nine organizations involved are: 1) Beroepsorganisatie Nederlandse Ontwerpers - BNO (Organization of Dutch Designers); 2) Branchevereniging Nederlandse Architectenbureaus - BNA (Branch organization Dutch architect bureaus); 3) Beroepsvereniging Nederlandse Interieurarchitecten – BNI (Professional Association of Dutch Interior Designers); 4) Dutch Digital Agencies – DDA; 5) Dutch Games Association – DGA; 6) Modint: Business network for the fashion, interior, carpeting and textile branch; 7) Vereniging voor Communicatieadviesbureaus - VEA (association of communication advice organizations); 8) Organization for Dutch Photographers – DuPho; 9) Popcoalitie (organizations in the pop and dance music sector). The most important tasks of the FDCI are being the discussion partner of the government for the creative industry and lobbying for overarching interests of the industry.

Just like in other European countries, also in The Netherlands there are examples of other emerging actors that also serve the interests of the sector. An example is SMartNL[13]. SmartNL is based in Rotterdam and has the aim of strengthening the financial basis of creative work across the Netherlands. There are also organizations that focus specifically on strengthening the position of freelance workers regardless the sector they belong to. This is also very relevant in the creative industry given the large share of freelance workers.

Informal organization, for example within online communities, is very important in the creative industry. Often these online spaces start informally and small but gradually take on the function of organizing professional communities. These groups circulate information about industry developments, generate forms of professional support, give each other feedback or help each other.

2.6. Social security: employers, employees and freelance workers

Whether and how social security is arranged in the Netherlands depends to a large extent on your position in the labour market: whether you are an employer/freelance worker or an employee. In this section we discuss for these groups how central social security measures are arranged: illness and disability to work benefits, unemployment benefits and pensions.

[13] SMart, société mutuelle pour artistes, was set up as a non-profit organization in 1998 in Belgium. It is a cooperative that help help artists in the management of their work activities. The idea is that solutions could be designed that would allow creative professionals to work on their projects without being overwhelmed by administrative burdens and the worry of unpredictable cash-flow. SMart has now almost 90,000 working members in nine country in Europe (Belgium, France, Spain, Sweden, Italy, The Netherlands, Germany, Austria and Hungary), who are artists and creatives.

2.6.1. Illness and disability to work

Employees that fall ill or become (partly) disabled to work are covered by law. Their employer needs to continue paying their salary (at a level of 70 percent) during two years or until their temporary contract ends[14]. During this period the employer is responsible for helping the employee to reintegrate. After this period, the contract of the employee will terminate and he/she can receive social support from the government. Employers can decide to have an insurance covering the risk of employees falling ill.

Employers, entrepreneurs and freelance workers are not automatically protected. They can decide to have a private insurance covering the risk of falling (long term) ill or becoming (partly) disabled to work. Upon closing such a private insurance one can generally decide after which period of being unable to work, the insurance will start paying and what the monthly amount covered will be. The sooner and the higher the amount, the more expensive the insurance.

2.6.2. Unemployment

Employees are in most cases insured for the risk of becoming unemployed and have the right to receive unemployment benefits when losing their jobs. The duration of this benefit is related to the work history of the employee. This is not the case for employers, entrepreneurs and freelance workers. When they have no income, they have to terminate their company to be able to receive social assistance from the government.

2.6.3. Pension arrangements

The Dutch pension system has two major pillars. One is a universal pension based on residence. This is available to all that reach the pension age and the level is independent from their income or employment history (it only depends on the years of residence). The other is an occupational pension for employees, financed from employer and employee contributions and organized in sector or company pension funds. The level of this pension depends on the level and years of contributions and on the state of the specific pension fund. Almost all employees in the Netherlands are covered by such an occupational pension, although certain branches in, for example, the creative industry are not or not entirely covered. The occupational pension normally does not cover freelancers or employers, although these can make their own arrangements.

In recent years there is a very lively debate in the Netherlands concerning the social security situation of the self-employed and freelancers, spurred by the rapid growth of this group and the observation that many of them do not make their own arrange-

[14] There are some exceptions, for example when the illness is pregnancy related, the government will pay the salary of the employee.

ments to insure against sickness, disability, unemployment or old age. This is an ongoing debate that has not yet reached a clear conclusion, but it seems very likely that in the near future some sort of (voluntary or obligatory) will be proposed by the government.

2.7. Factors influencing interest representation

The social actors interviewed express that it is not always easy to organize the creative sector in similar ways as the rest of the Dutch economy. This counts first of all for the creative sector as a whole, but also for the different subsectors. The extent to which the various subsectors are organised in trade unions and employers' organisations depends very much on the traditions in the specific subsector. For example, in the journalism sector there is a long history of union membership, but in the games industry this tradition lacks completely. There are however several factors that can affect the capacity of traditional industrial relations actors to organise the sector, which we outline here.

2.7.1. Position scattering

In the creative industry, career paths are far from linear. Changes in the type of employment status (such as freelance workers, employers, employees) are frequent and individuals recurrently hold different positions *at the same time*: combining for example a position as an employee with self-employment.

> *The difference between being an employer or self-employed and employee are so vague within this industry.*
> **Representative of a professional organization, games industry**

The diverse and changing landscape of employment relationships in the creative industry means that workers often have different, more diverging or more often changing interests than those in traditional industries. Traditional interest representation groups, such as trade unions and employers' organizations, cannot approach this industry in the same way as they do in other industries. Indeed, as shown in Paragraph 2.5, some trade unions try to respond to the different circumstances in the sector by including employees as well as freelance workers and even employers in their target group and to provide services that are useful for all these types of workers. At the same time, we observe that in some sectors not the traditional actors, but rather professional organizations and forms of self-organization through loose networks play a key role.

2.7.2. The creative sector?

Where the creative sector at large is concerned, the notion of a creative industry in the Netherlands was introduced in a top down manner. The government decided it was an important sector and a sector to begin with, whereas the various sub-sectors, the components of the creative industry, were not aware of the concept of a creative sector let alone that they considered themselves part of it. This notion came rather late and slow, and upon the initiative of the government, not bottom-up. In response, the various sub-sectors made an attempt to organize at the national level, which resulted in the Federation Dutch Creative Industries.

> *The origin of the Federation is the evaluation of the key-sector approach of the Balkenende cabinet. The creative sector, completely unaware, even about the existence of such a sector, received a yellow card because of its lack of organization. Small scale industry, messy, impossible to deal with, doesn't deserve to be named a key sector. When this notion started to settle down, we said we can at least try to pretend to be organized. That is when we decided to put the creative business services under one umbrella organization, which has become the Federation.*
> **Representative of a professional organization, creative industry**

The social actors interviewed however mentioned that it is still not common for people in the industry to see themselves as the creative industry, they lack a collective sense of identity. The interviewees see this as one of the causes that it is much harder to organize the sector at a sectoral level rather than only at the level of the sub-sectors.

> *I think typical for the Creative Industry is there is a lot of fragmentation because every gamer thinks he is unique, the same as any animator, the same as any drawer, and when you focus on the details, it is true, but when you put it in a broader prospective, you see a lot of common problems, common interests.*
> **Representative of a trade union**

Still, the government expresses that for them it is important to have the industry being represented by (a) central organization(s). They need direct connections and go-to organizations to talk to the industry as they do with all other economic sectors. Moreover, the person interviewed at a government body mentioned that it helps the industry to be more centrally organized, to be heard and recognized by the government.

> *They are still too fragmented. Recently there have been quite many fusions. And they themselves think that they are already enormous fusion organizations, but I think that if you want to be heard by the government, you have to present yourself as being the creative industry. In former times maybe, when the departments were bigger, it was maybe possible to be invited to the ministry as an interior designer, but nowadays we just don't have the time to talk to all these parties separately. Therefore, the creative industry needs to be organized as one block. Especially when you want to compete with all the other sectors.*
> **Representative of a ministry**

For the government having the various bodies that represent the industry within the top sector policy (DCC, top team creative industries, ClickNL) helps to have a direct connection to the industry. In potential they also see the Federation Dutch Creative Industries fulfil this role, but at the moment they do not (yet) have this position.

> *We have the Dutch Creative Council, with 20 members that are fairly representative for the sector and we have the Top Team which we meet every two weeks, so actually we know rather well what is going on in the sector. We like it to have such a sounding board: [..] they let us know when we do things they do not agree with and we can also say that we observe this and that which we would like to change, what do you think?*
> **Representative of a ministry**

2.7.3. Characteristics of the people working in the sector

Social actors also mention that the demographic and personality characteristics of those working in the sector make them hard to organize. For example, trade unions mention that there are relatively many young persons in the parts of the creative industry that are not covered by collective agreements. As it is hard for them to organize young people in the Netherlands in general, this is also the case in the creative industry.

Interviewees also mention that the fact that people working in the creative industry do not seem to see what they do as work but rather as a way of living causes them not to prioritize organizing their interests. Their individual creativity is prioritized, not creating circumstances for great working conditions and realizing a high income. They are content as long as they are able to be creative. The social actors in the sector mention this as one of the reasons why it is hard for them to organize people in the sector, although again this is not the case in all subsectors.

> *This sector has an ambivalent stance in the economy. They earn money because they can buy bread with that money, roughly put. But actually that is all trivial. The only thing that really counts is the realization of your own ideas. In the end, all that counts is the creative realization or the realization of the creative.*
> **Representative of a professional organization, creative industry**

> *It is more essential to produce work, to develop a game or to make animations, to draw, than to earn money. And that's the tricky part. It makes our position relatively weak because there tends to be a low organization interest, but also, well, people tend to take the job anyway.*
> **Representative of a trade union**

2.7.4. No money

The social actors and the government also point out that there is little money available in the sector and therefore it is difficult to set-up organizations with a lot of overhead: things need to be flexible and small.

> *We are located in a café. That is a good thing, because it means you have no overhead costs. This sector is almost unable to carry any overhead costs. So everything that exists about this kind of organizations had become much smaller during the economic crisis. It is all about shoestring solutions and therefore we have to minimize what we do.*
> **Representative of a professional organization, creative industry**

2.8. Conclusions

The creative industry is a rapidly growing sector that outperforms most of the rest of the economy. It is considered a key sector for both growth and innovation. The sector is characterised by a high share of self-employed or freelancers and a relatively low share of employees. The traditional industrial relations actors and institutions that have a core position in most of the Dutch economy play an important part in some of the subsectors of the creative sector but not in others. In a number of subsectors, they find it hard to organise the sector because the boundaries between being a worker, a freelancer or an employers are blurred, because there is no clear collective identity, because the people working in the sector are relatively young and prioritise creative options over traditional interests, and because there is little money to set up organisations.

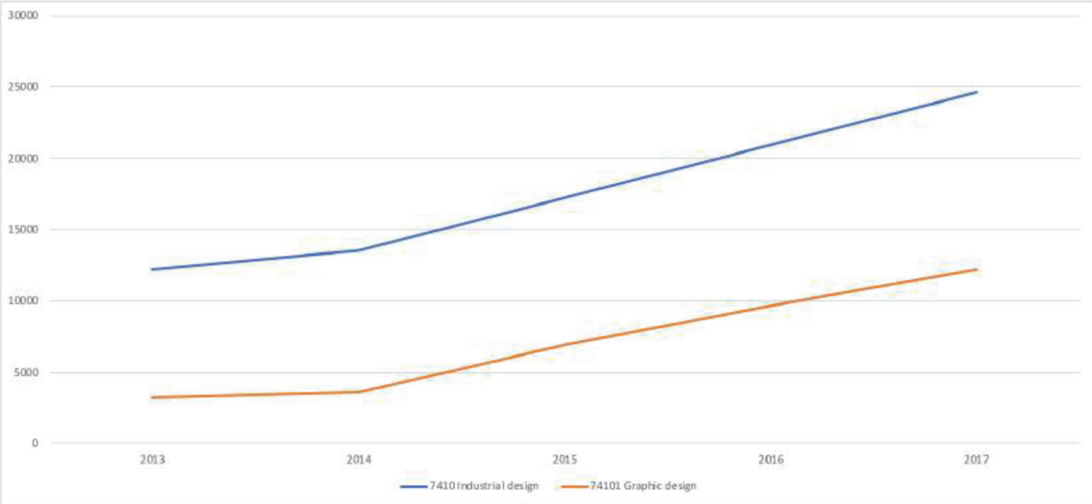
Collective interest representation in those subsectors, if any, is mainly done by professional or occupational organisations that aim to represent workers, employers and freelancers at the same time, building on occupational identities. Such identities are strongest at the sub-sectoral level. When the government wanted to dialogue with representative organisations that cover the entire creative sector such organisations were established but only over time an identity as creative sector is (slowly) developing.

3. The graphic design industry

3.1. Description of the sector: evolution and trends

The graphic design industry (SIB code 74.101) is part of the larger industrial design sector (SIB code 74.10). Both the larger industrial design sector and the graphic design sector experienced a rapid increase in the number of companies since 2014 (see: Figure 3.1), after a strong crisis-induced decline in the period 2010-2014. Between 2014 and 2017, the number of companies in graphic design has grown from 3,200 to 12,220, while that of the entire sector of designers grew from 12,175 to 24,645 companies.

Figure 3.1 – Workers in design (74.10 and 74.101), 2013-2017



Source: CBS – OpenData – Bedrijven; bedrijfstak – last access: 19 February 2018.

The graphic design sector is characterized by a high incidence of freelancers and small firms and an absence of large companies (see: Table 3.1). In 2017, only 10 graphic design companies in the Netherlands had more than 20 employees. The number of freelancers/self-employed quadrupled in the period 2013-2017 to almost 12,000. A more limited increase was experienced by the small businesses with up to 20 employees. The sector is populated mainly by males, who represent over 70 percent of the workforce in the sector.

Table 3.1 – Companies by size in graphic design, 2013-2017

	2013	2014	2015	2016	2017
1 worker	3,070	3,495	6,685	9,370	11,935
2 workers	95	80	100	145	160
3 to 5	20	20	50	50	60
5 to 10	10	5	15	25	40
10 to 20	5	5	5	15	15
20 to 50	0	5	10	5	10
50 and over	0	0	0	0	0
Total	**3,200**	**3,610**	**6,865**	**9,610**	**12,220**

Note: the category "1 worker" refers mainly to freelancers/self-employed without personnel.

Source: CBS – OpenData – Bedrijven; bedrijfstak – last access: 19 February 2018.

The graphic design sector has undergone many changes in recent years that have had a strong impact on the way people work. Two major developments can be identified. First, since the 1990s, digitalisation on the one hand has allowed for strong productivity gains while on the other hand it gave access to a broader public to graphic design programmes. Both developments had a negative effect on employment in the sector. The second is the economic crisis starting in 2008. The crisis first of all, in the short term, resulted in important job losses. Moreover, in its combined effect with the quickly advancing digitalization that lowered the barriers to entering the profession, it contributed to creating more fluctuating careers and a vertically disintegrated industry.

The share of self-employed people in the profession increased over the years, at the expense of the share of permanent employees in the industry, which shows a downward trend already for years (BNO 2018). An explanation is that experienced designers who lost their jobs during the crisis became self-employed. In fact, several relatively large firms have gone out of business, and those who survived reduced their staff, causing an increase of freelancers on the market. In terms of working hours, the BNO survey reports that 38% of graphic designers work between 32 and 40 hours a week; 29% more than 40 hours; 28% work between 20 and 32 hours a week, and the remaining 5% less than 20 hours a week (BNO 2018). Most noticeable here is that almost 30% works more than 40 hours, the standard working week.

As to the major clients of graphic designers, they are: commercial and financial services (20%); industry and construction (12%); government central and decentralized (12%); cultural and art institutions (11%); consumer product (9%); education (8%); healthcare (6%); NGOs and not-for-profit (6%). With regard to the markets, in 2016, the percentages of revenues coming from the domestic and foreign market are in line with those of the previous years. 92% of the annual turnover is achieved in the Netherlands; 6% of turnover originates with clients from the rest of Europe; and only 2% of total annual turnover is generated by clients from outside Europe (especially Asia and North America).

3.2. Interest representation

As the largest part of the graphic design industry is not covered by a collective agreement.[15] There is no employers' organization in the graphic design industry but there are some trade unions active. The Kunstenbond is the trade union most actively involved in the graphic design industry. Also other trade unions try to get members in the sector but without a specific focus on the graphic design sector. Because there are no collective agreements in the sector, the trade unions focus on offering services to members in the sector as well as lobbying for their interests on a national level. Services offered by the Kunstenbond are the provision of information (for example about taxes), legal advice, screening of contracts, help with taxes for freelance workers, contract negotiation, company advice, training and discount on insurances[16]. The trade unions target employees as well as freelance workers.

[15] There is one collective agreement within the graphical industry: the Grafimedia collective agreement. The scope of the collective agreement does however not cover graphic design companies if they do not hold a printing department. Only those graphic designers that work in-house in a printing company are covered by this collective agreement. Other graphic design studios are not covered by any collective agreement and thus only have to adhere to labour law. This concerns the graphic designers studied in this report.

[16] www.kunstenbond.nl, 28-09-2017.

The professional organization for designers Association of Dutch Designers (Beroeps-organisatie Nederlandse Ontwerpers - BNO) plays the biggest role with regard to interest representation in the sector. One becomes a member based on the profession rather than on one's employment status: employers, freelance workers and employees can all join. Employer membership covers also the employees in the company. The reason the BNO wants to reach out to all types of persons working in the sector is the blurred boundaries between employment statuses.

> *We believe strongly in servicing all the different groups because individuals cab have all these different positions during their working life, so an individual can start as an employee, then decide that he is going to be independent, and then grow and become a business, and being an employer as well. This is not a linear development. This can occur in many different variations. So it is good and I think useful that a professional organization knows all the positions, knows all the individuals who are having these positions, and services them.*
> **Representative of a professional organization, graphic design industry**

BNO describes its activities as "BNO supports designers and design agencies in their professional practice. By investing in public information, regulation, research and education, BNO represents the collective interests of the design community and contributes to improving the design infrastructure in the Netherlands and Europe"[17]. The concrete services they offer to members are for example, legal advice, courses on creative skills or entrepreneurial skills, individual coaching and mentoring programs, seminars and events, and the organization of local networks. In addition, they promote the sector by representing it at national and international events and lobby for the interest of the sector at the national level. They also analyse the state of the industry in a yearly report on it, which serves as a benchmark for those working in the industry[18]. Finally, they offer their members insurances or options to participate in a pension scheme of a third party with a discount:

> *We do have collective arrangements or I'd say we work with a broker…it is not a broker, but it is more like one dedicated party who offers insurances and also individual and collective pensions for the members.*
> **Representative of a professional organization, graphic design industry**

In addition to their services and lobby activities, the BNO publishes a working conditions guideline which includes a wage scale and job description matrix[19]. These voluntary guidelines set a standard in the sector, similar to a collective agreement but without being legally binding. According to the BNO, most member organizations use the guideline. The guideline is updated each year based on "the economic- and societal developments on the labour market" (BNO 2015). The update contains an

[17] http://www.bno.nl/english/about-bno, 29-09-2017.
[18] http://www.bno.nl/english/about-bno, 29-09-2017.
[19] http://bno.nl/advies-faq/salarisrichtlijn, 04-12-2017.

advice for a general salary increase based upon the "indexation numbers of the national statistics office, the societal developments and the developments in the sector specifically" (BNO 2015). For 2016, the proposed general salary increase was set at 1.5 percent.

The working conditions guideline includes legal standards, for example for the statutory minimum wage, holiday pay, salaries for part time workers, the Flexible Working Act and leave policies. However, some guidelines go over and above the legal standard. For example, they advise to pay sick employees 100 percent of their salary during the first year of illness (minimum legal requirement is 70 percent), advice 24 holiday days a year for full time working employees (20 is the legal minimum) and advice to support relevant training for employees with time and financial compensation. The full time working week, which tends to vary in the Netherlands between collective agreements, is set in the BNO guidelines at 40 hours a week which is at the higher end of the spectrum compared to other sectors. The guideline also mentions some practices and habits in the sector. For example, it states that the full time working week excludes lunch breaks, but also mention that "in practice the length of the break is not strictly kept" (BNO 2015). The guideline leaves open how employers should take care of the pensions of employees, but offers some direction in what the options are at pension funds. Moreover, they state that most employers in the sector have an insurance to cover the risk of long-term illness of employees.

There are seven wage scales distinguished in the guideline, each corresponding to a certain category in the job description matrix. In 2016, the lowest wage scale started at € 1,529.00 and the highest wage scale ended at € 12,217.00. There is a possibility to go above the maximum of one of the salary scales for those workers that have reached the end of the scale and continue to perform excellently. They can get a maximum of 5 salary steps on top of the scale end. For those workers that are promoted to the next scale, it is specified that it is normal to give them an additional salary step.

3.3. The case studies

Five companies and three freelance workers took part in the study. They are all located within the city of Utrecht. The companies employ between three and twelve people and can therefore be regarded small companies, which is the case for most of the sector. None of the companies included in the study are covered by a collective agreement. Of the companies interviewed, all are member of BNO and of the freelance workers interviewed one is a member. Table 3.2 provides an overview of the size of the organizations and the employment status of the persons interviewed.

Table 3.2 – Interviews at the sectoral level: the graphic design industry

	Organization	Who interviewed	Size[20]	Member of BNO	Location
1	Graphic 1	1 employer	6	Yes	Utrecht
2	Graphic 2	1 employer	3	Yes	Utrecht
3	Graphic 3	1 employer 1 employee 2 freelance	12	Yes	Utrecht
4	Graphic 4	1 freelance	1	Yes	Utrecht
5	Graphic 5	1 freelance	1	No	Utrecht
6	Graphic 6	1 employee	12	Yes	Utrecht
7	Graphic 7	1 freelance	1	No	Utrecht
8	Graphic 8	1 employer 1 employee	5	Yes	Utrecht

3.4. Sector developments

The graphic design is an industry that goes back a long time. The interviewees stressed that the sector and their work had gone through a series of transformations in the last decades. These include first of all digitalization and the economic recession, while also the organization of work and the related employment forms have changed significantly. In this paragraph, these developments are discussed.

3.4.1. Digitalization

The interviewees indicated that the approach to work has changed during the last decade in response to technological advancements and digitalization. Where the work used to be focused on printed materials, most of the work nowadays is designed for digital media. This requires a different approach to design, but has for many also changed the services they offer and the way they approach customers. Instead of "just" designing a poster, flyer, magazine etc., their service has changed to offering to rethink the customers' corporate identity.

> *For example the requirement for desktop publishing activities is diminishing. So we no longer base our services on that. We moved to being involved in the strategic run-up phase to a certain brand-design issue. So we really moved, literally, from graphic design development and content –we even had that mentioned in our company name- to a brand design agency.*
> **Graphic 1, employer**

Also the institutional actors in the sector mention that digitalization has had a big impact on the sector.

> *The clients ask not only for the business card or the leaflet, but they also ask for the website and they ask for an app. And as a graphic designer, you are supposed to nowadays, to be able to do so. So, you have to keep up with the digitalization. We see very talented and*

[20] Freelance workers hired by the company are not included in the size of the company.

> *very successful graphic designers who already missed the boat because they didn't keep up with digitalization*
> **National 2**

The interviewees mentioned that another consequence of digitalization for the work of graphic designers has been the declining respect of the public at large and customers specifically for the work they do. Because people have access to designer programs themselves and it is easy to, for example, put together a flyer on your own computer at home, the value they see in professional graphic design has declined. This makes it more difficult to demand reasonable prices to clients.

> *You used to be placed on a pedestal as a graphic designer. Just have a look at the history… what kind of designers… they were almost artists. People wrote about them. Now you have the situation that many people think like I can just do that myself. I can just look for an illustration somewhere and there are more and more fonts available for free.*
> **Graphic 8, employee**

3.4.2. Economic recession and the organization of work

The economic recession was felt heavily by the interviewees in the sector. They mention that one of the first things client companies stopped investing in were communication, marketing and brand development, or the services offered by the graphic design industry. The recession made them realize that the sector is very responsive to the economic climate.

> *The sector is dynamic, it's on the move, but that also means that if the economy declines… our work mainly comes from marketing and communication departments, and if the economy is bad, this is one of the first things that is cut. You need to be able to survive this…*
> **Graphic 3, freelance**

The economic recession also affected the way some of the interviewed companies in the sector prefer to organize the work. These employers mention that they had to reduce the number of employees during the crisis and that afterwards they preferred to keep the basic organizational size (permanent employees and owners) smaller. This way of organizing, they argue, makes them more flexible and less vulnerable for economic up- and downturns.

> *We chose not to hire any new people because it was a time of economic crisis. So we said at first let just do the things we can do with the two of us. It is just the case that the market has become less predictable. So I prefer to be a compact organization, lean and mean. We had employees on temporary contracts, but we chose not to extend them. And to be honest, that was a good timing. I have to say, overall we are doing fine. But you still feel it, some years are better than others. Therefore I like to stay compact and hire people when absolutely necessary.*
> **Graphic 2, employer**

To be able to deal with a larger amount of work in economic prosperous times, new ways of organizing the work were developed or existing practices expanded. Strategies to deal with fluctuations in work mentioned by the interviewed employers in the industry are nowadays the use of freelance workers, collaborations with other companies, project based coalitions and the outsourcing of work. Employers' own networks are central in organizing the work: they hire the people and collaborate with organizations they know. Also freelance workers mentioned to make use of their network to deal with fluctuations in the amount of work and to share knowledge and skills.

> *We often collaborate with other bureaus, but only during peak seasons. […] We look for the right people in our own network, self-employed or freelance workers, who then join us temporarily. That can be a month, a week, a couple of days or sometimes even just a day. Everyone needs to stay focused. It looks like a creative hotspot at these times. But we have a strict planning. At a certain moment we go live. Everything needs to be ready and fit together at that time.*
> **Graphic 3, employer**

> *I am now trying to create a small outsourcing network together with some other programmers in the sector in which we can outsource assignments to each other and help each other. You can more easily set up a flow in which you share an assignment or share a code and review it.*
> **Graphic 3, freelance**

However, other companies were reluctant to stop hiring employees. Some employers stated that they rather hire employees than make use of freelance workers, because they like to build their own team and have employees really attached to the organization. They argue that this is positive for motivation and productivity.

> *I don't work with freelance worker. I rather have employees, the reason being that I see my company as a place to connect people. I really believe in saying to somebody else that (s)he belongs to the company and that I would like to be involved in the relation. I believe in having a contract with each other. I really believe that. I want this company to be such a place. I don't want to do it alone. I want to be an organization of 5 or 6 people and that we can all say, we are from [name organization]. And that people really feel it that way.*
> **Graphic 8, employer**

3.5. Employment forms

The employment forms that can be observed in the graphic design industry are employer, employee, freelancer and interns. The preference expressed by some of the employers we interviewed to stay small and flexible and organize the fluctuations in work by ad-hoc cooperation, we found to be reflected in the reasons why many workers work freelance. Although for some freelance workers this is actually their preferred option or the first option that occurred to them, this is not the case for all. Many prefer to work as an employee or to have started their career as an employee first, to gain experience before becoming a full-time freelancer. They, however, did not manage to find a job at the time and therefore decided out of necessity to become a freelance worker. Indeed, the high incidence of freelancers is not a reflection of individual preferences. In addition, cases were mentioned where an internship contract was used after graduation to bridge a period where the employer was not sure whether additional employees were necessary.

> *It was seven years ago, there were really no jobs in this sector. So I became a freelance worker, more or less out of necessity.*
> **Graphic 4, freelance worker**

The other side of having many freelance workers in the sector is that is has become more difficult to be successful. Having other people notice you and hire you as a freelance worker has become more difficult in this highly competitive context, especially for recent graduates without experience. To become really successful as a freelance worker, it is important to have big names in your portfolio.

The employers and freelance workers included in this study often mention that having their own company was just something that happened to them and not necessarily an expression of their entrepreneurial drive: people in their environment asked them to design something and one thing leads to another. An important reason they mention why they do like to have their own company is the (artistic) freedom it gives them: they are able to choose their own projects and develop their own style. Also employees mentioned during the interviews to flirt with the idea of having their own company for exactly this reason. An important reason people nevertheless prefer to be employee is to be free from the tasks of running a business and to be able to devote their time to their artistic talents. Moreover, working in a team rather than alone (as a freelance worker) gives them the opportunity to learn new skills from their peers. This all points to the fact that being creative and developing in this direction is seen as the most significant part of the work in the sector.

> *I like it to be an employee. I don't like acquisition or the business part of paying taxes and that kind of things. I like to design things and to think about these other things as little as possible.*
> **Graphic 8, employee**

3.6. The characteristics of working in the sector

In Chapter 1, it was pointed out that in the literature work in the creative sector is often argued to be of a precarious nature: there seems to be a trade-off between being creative on the one hand and earnings and security on the other. In this paragraph, it is first discussed how the interviewees characterize work in the sector and second, whether they observe a trade-off between job characteristics and earnings and security.

3.6.1. Job and workers' characteristics

The intrinsic motivation to work in the sector is high. Graphic designers have often been attracted to working in the design industry from a very early age onwards and feel that there is no real other option for them because they like it so much. Interviewees mention a sense of belonging to the sector and it being part of who they are. For them, working in the sector is more than a job. It defines who they are both at work and beyond. They refer to it as a lifestyle.

> *I was sitting over there [art school, red.] and saw all these people and I thought, yes! I am finally at home. I still remember that very clearly. And the director of the institute welcomed all first year students and said you are not choosing a profession but you are choosing a way of life. And I really felt this, I was 17 but I immediately understood. And my first thought was, it is not really a choice for me, this is just how I want to live.*
> **Graphic 8, employer**

> *It is a typical kind of people [in the sector, red.]. It is a type of DNA.*
> **Graphic 3, employer**

The work in the sector being a lifestyle for the people working in it, also means for many of the interviewees that self-realization within their work is important for them. They want to "do their own thing" and "follow their own path" in the things they create. Characteristic for the people working in the sector is therefore also that they are motivated by the work itself. They feel joy in the production of the things they create and passion for the work they do. Their passion is an important driver.

> *It is just fun to produce beautiful things and good things that make us, but also the client, happy. That gives an enormous feeling of satisfaction.*
> **Graphic 2, employer**

> *I found it to be so interesting and fantastic that you can make something really important with something visual. It can determine whether somebody choses something or not or whether a message arrives or not. So I took that to the next level and still I enjoy it immensely and you can keep growing in it.*
> **Graphic 3, employee**

Workers in the graphic design industry mention the good atmosphere in the sector and the relaxed and informal nature of it as an important characteristic and an important reason why they are drawn to it. The informal nature of the sector is created by the people working in it and reinforced by others outside the sector that expect and accept creative people to be more informal.

> *An advantage for me is that it feels like a very free sector. It always feels very nonchalant and I like that a lot. It is actually very relaxed. Even more when you are relaxed yourself of course, but many people also expect creatives to have a certain amount of nonchalance. And I like it that way.*
> **Graphic 3, employee**

The diversity of work and clients is seen by many of the interviewees as an advantage of working in the sector. It keeps it interesting and challenging. One way of deliberately keeping the work diverse is the practice of many of the companies interviewed to offer their services for reduced prices to clients with little money but "nice" organizational objectives and/or "cool" and "societally relevant" projects. Apart from creating diversity in the work itself, they mention to see this as a way to contribute to society and to showcase their creativity.

> *We believe social return to be an important DNA-aspect of our company. We look for partners that we can accommodate. […]. Business is going well for the organization. There is always some spare-capacity and we want to make this useful.*
> **Graphic 3, employer**

> *We try to work according to the principle that we only accept clients that are willing to pay a certain budget or for clients that do not have much money but whom we believe to be a nice organization or a nice project.*
> **Graphic 2, employer**

3.6.2. Trade-offs between earnings and other job characteristics?

The interviewed employees and freelance workers in the sector report that the money they make is less important to them than other attributes of working in the sector. The benefit of working in the for them very attractive sector makes up for the potentially lower earnings. The fact that they love the work they do is more important than other benefits attached to it.

> *I would have liked to earn more, but I guess everyone would like to. No, for me it is more important that I like my job.*
> **Graphic 8, employee**

> *I need to be able to pay for my living expenses and it needs to have potential. But the financial side of things is less important to me than the joy I feel while working and the challenge it holds for me.*
> **Graphic 3, freelance**

Also interviewed employers mention that the client itself or the type of work they are hired to do often is more important than the money they are able to make. This leads to companies agreeing to work for lower fees.

> *This week I gave a presentation to a party that we think is terribly cool, super nice, fantastic ambitions, nice people, a great connection right away. But very little budget. So I hear myself saying to them, yes, look this is the offer, and it is a very tight one. That means that if we, for whatever reason, say we need to add something at a certain stage, than the budget immediately needs to go up. At that point I thought this is something we do quite often, that we make our offers too tight.*
> **Graphic 8, employer**

The interviewed employers also recognize within employees a priority for interesting work rather than high earnings. In order to attract the best (young) employees, they offer them an attractive place to work in terms of atmosphere and contents of the work rather than a high salary. According to the interviewed employers, this is what binds these employees to the organization. This illustrates that wages are often not the main motivator for people in the sector and that they are willing to give up some of their potential wages in order to be able to work at a "cool" place or being able to do interesting projects.

> *But I think as well, now that a family is starting, now you can start to rise a bit quicker in terms of salary. Before that time they don't regard it important at all. They have a small house or apartment and say "I just want to be happy and do cool things". Not that I anticipate on this as a commissioning company, but they are looking for personal growth and involvement with the company. This is what we can offer compared to companies that are ahead of us in terms of HRM or other things.*
> **Graphic 3, employer**

Hence, although the quality of work may not always seem sufficient from an objective point of view, it is often argued that from a subjective point of view this matters less, as it is compensated for by opportunities to express one's creativity and follow one's passion.

3.7. Traditional and alternative forms of voice and representation

Traditionally, in the Netherlands, trade unions and employers' organizations negotiate in a sector to determine working conditions. As already discussed, these traditional organizations play a very limited role in the sector. In this paragraph, we discuss the role of representation as viewed by our interviewees.

3.7.1. Familiarity of the workers with organizations active in the sector

The interviews confirm that the professional organization BNO is the main organization that represents the interests of those working in the sector. Organizations that represent the interests of the sector on an even higher level, such as the Federation Dutch Creative Industries and the organizations connected to the top sector policy (e.g. Dutch Creative Council, ClickNl) are not well known in the sector. According to the interviewees they are not really visibly present in the sector, what leads them to question the effectiveness of these organizations.

> *I am not sure whether they are effective. I really don't know, except for the very practical things like guidelines etc. For the rest I don't know.*
> **Graphic 2, employer**

3.7.2. Trade unions

The main reason that none of the employees and freelance workers interviewed in the sector were a member of one of the trade unions is that they did not see any advantages in being a member or they simply had not thought about it. They had the feeling that they could deal themselves with the issues concerning which the unions offer services. Moreover, they felt that they could solve all potential problems with their employer without the help of trade unions, mainly because they work in small organizations and teams. They see their employer as very approachable. They had never run into problems in the past. In the hypothetical situations that they would, they would consider becoming a trade union member or to simply leave the organization in order to find a better place to work (opt out).

> *For a while I have been a member of FNV, which is supposed to also do things. […] Other recommended me to join. I looked into what they could do for me. For example, invoicing but also meetings to discuss fees and general terms and conditions. In the beginning this seems interesting to me. But at some moment I thought, I can do all this myself. The couple of 100's of euros you throw away each year can better be invested in something else. I think that if you are trying to get everything out of your membership, they can be of value to you. But this was not what interested me, because I wanted to do it myself. I am too stubborn.*
> **Graphic 3, freelance worker 2**

> *I can discuss anything here. I never felt I needed help with something. I see it [trade union membership, red.] as something you do when you run into issues with your employer. That you can go to the trade unions then. But actually, issues are always solvable here.*
> **Graphic 8, employee**

3.7.3. The employers

There is no specific organization for employers in the graphic design industry or the creative industry at large, which is why the employers in our study are not a member of an employers' organization. They, however, indicate that they would like to have such an organization specific for their sector, especially because they miss contact with other employers in the sector on a regular basis.

> *I think that if there would be an employers' organization I would certainly become a member. I would like to discuss collaboration and what needs to be formalized and what not. Just to acknowledge that the creative sector does things differently than other sectors.*
> **Graphic 8, employer**

3.7.4. Alternative forms of representation: professional organizations

The main interest representation organization in the graphic design industry is the BNO. They represent the interests of designers, regardless their position as employer, employee or freelance worker. Many of the interviewees are a member, whether on a personal basis or through the membership of their employer. Freelance workers and employers mention especially the legal advice offered as valuable and a reason to be a member.

For me, BNO is very useful. Also when we run into legal things it feels better if you can contact somebody first hand.
Graphic 2, employer

Also the other services offered by the BNO, such as courses and information meetings are valued, although they are less often mentioned as a very useful service by the interviewees than the legal advice service. Employers also regard the representation of the sector on a meta-level important. In general, interviewees did not have a very clear idea of what the BNO is actually doing at this level, but they valued the idea that some organization is voicing their interests at a national level.

[they represent the sector at a national level, red.] if you talk about legal rights, and yes, I do have the idea that… yes it does feel like that, that they actually address things.
Graphic 8, employer

Apart from the direct value that interviewees see in a membership of BNO, it was also seen by some as something you just do when you are part of the sector. For them, it is a status symbol as well as a way of showing to customers that you are a reliable party. It serves almost like a quality label. In addition, the mere existence of the BNO contributes to a sense of being a sector among workers.

For [name co-director], because he attended Art school, it is also a status symbol to be a member of BNO.
Graphic 1, employer

I like it that there is some kind of overarching organization where you can have a look once in a while, or on their website or visit evenings they organize. I like that. [...]. It gives me the feeling that it is important what we do and that its alive or something. If we wouldn't have that, it would be kind of empty. I like it that there is some kind of organization that is responsible.
Graphic 3, employee

Interviewed employers also indicated to like the standard format for a contract with clients as formulated by the BNO. However, they still feel it is difficult to actually use it. They state it is hard to be convincing enough and strong enough in relation to a customer to have them accept your terms and conditions, even though they are the standard terms and conditions as set by the BNO. They are in a vulnerable position in the relationship with their customers.

3.8. Perceived demands for representation of workers in the sector

The people working in the graphic design industry interviewed in the context of this study feel sufficiently represented by the BNO. They do not have the feeling that working conditions should be formalized more, for example in the form of a collective agreement. They state that the voluntary guidelines as developed by the BNO are sufficient and that it works to regulate things lightly in the sector because the sector exists of so many small companies.

Nevertheless, they would like the services as provided by the BNO (or another organization) to be extended. Services mentioned are the provision of a pension fund for the sector and support for (starting) employers in the sector in running a business. They feel that the step from just being a creative towards the responsibilities of employing people is a big one during which they would like to receive support. They would also like information on what to do when your company grows bigger and how the legislation changes accordingly.

In addition, employers we interviewed in the sector state that they would like a stronger representation towards the outside world. First of all, they would like to have a better communication as a sector to companies in other sectors with the message what they can help them to get more customers.

> *It would be good if they would do some missionary work. That they would show to business the strength of our sector and what we can contribute. Then maybe they get the idea to hire a local company.*
> **Graphic 2, employer**

Second, they would like a stronger representation towards the government in order to lobby for legislation that is more attuned towards the practices in their sector. More concrete, they refer to more lenient legislation for the use of temporary contracts: they feel this fits the practice of project based coalitions in their sector better. Moreover, it means less risk for employers in a sector that is very sensitive to fluctuations of the economy. Of course, employers in the creative industry are not alone in their wish for a more flexible labour market; employers in many sectors in the Dutch labour market would be in favour of this[21].

3.9. Evaluation of the Top Sector Policy

Most of the workers in the sector do not notice, or do not know, that the sector is characterized a top sector in the Netherlands and therefore also do not know the institutions attached to the top sector policy. This is different for the employers. They often know the top sector policy, although it varies whether they see a benefit in it: some see it as important for the development of the sector whereas others see little benefit for their own organization.

> *I think the ones that are represented at the Dutch Design Week will feel addressed by it. But for me, it is just my daily job. […] For a top sector I do not feel like we are getting top policies that benefit us, no.*
> **Graphic 1, employer**

[21] See, for example, the standpoint of the national level employers' organization VNO-NCW: https://www.vno-ncw.nl/standpunten/flexarbeid, 4-12-2017.

3.10. Day-to-day realities at the workplace level

An important role of trade unions and employers' organizations in other sectors is the formal arrangement of certain social security benefits like occupational pensions, the setting of wage scales, arranging on the job learning etc., often in the form of a collective agreement. The absence of active involvement of these organisations and the absence of a collective agreement leads to the question whether and how these issues are arranged in the graphic design sector. In this paragraph, we look into this question and conclude with the question whether workers feel vulnerable with regard to working conditions.

3.10.1. Social security

Illness and unemployment

The employees in the sector are covered by the legislation regulating illness and unemployment benefits. For freelance workers and employers this is not the case. They are free to decide whether or not to make their own arrangements. Besides insuring the risk for themselves falling ill, becoming disabled or becoming unemployed, employers can have an insurance covering the risk of their employees falling ill or disabled. Most of the employers we interviewed has an insurance covering the costs of employees falling ill or becoming disabled. They vary in the period that they included as their own risk, between immediately and 6 months after the employee falls ill. One employer indicated not to have insurance because the company currently only employs employees with a one year-contract. Having an employee fall ill for the period of a year is a risk this person was willing to bear.

For themselves, most interviewed employers had made some kind of arrangement to cover the risk of falling ill or becoming disabled. Reasons for having a formal insurance were feeling a responsibility towards one's family or having no other safety net such as a partner or parents. These insurances often take effect only after a couple of months.

> *Seven years ago I had few responsibilities. You grow. I moved to a bigger house and got a family. There are more responsibilities, so you increase your insurance. The insurance now starts from an earlier date and lasts until I reach a certain age. There is no way to avoid this or you should go to a bread fund. But that is also very temporary. I would prefer not to have it at all, but that would feel irresponsible towards my girlfriend and my family. They would have to take care of me if something happens.*
> **Graphic 3, employer**

Freelance workers, on the other hand, do not always have something arranged for the risk of falling ill for a longer period of time. A common way to deal with this risk is saving enough money to be able to cover at least half a year of no income, whether this is because of illness or because the business is not doing so well at that moment.

The freelance workers see this as a better arrangement than a formal insurance because it meant that they did not have to spend the money now, especially because they felt the formal insurance to be particularly expensive. However, some of the freelance workers interviewed do have a formal insurance. This was for example the case when they wanted a larger share of their income covered for a longer period of time or when people in their network advised them to do it.

> *It was quite a lot of money each month. And it didn't last forever. It is smarter to save money and invest it, so you actually get something out of it. […] If I am unable to work for six months, nothing bad happens. I need that security. I also bought a house two years ago, which is also kind of a pension plan at the same time. It is a better starting point than some kind of shady pension fund. The disability insurance is too expensive and feels as a bigger risk than having enough savings.*
> **Graphic 3, freelance 2**

When freelance workers or employers indicated that they did not have anything in place for themselves, they often stated to have other people to fall back upon if things would turn out really bad: a partner or parents. They made a risk assessment and believed insurance unnecessary given their network. Although bread funds might be another alternative way to deal with risks and insurance, none of the people interviewed for this study actually opted for this possibility. They believed it to be too risky, too temporary (e.g. only two years when falling ill) or too uncomfortable to have an insurance with your own friends and acquaintances.

> *It [a bread fund, red.] is cheaper. But I rather have my insurance with people I do not know than the situation in which I know the people that receive my money when they fall ill. It feels a bit awkward for me. It gets too personal. For example, that you think when somebody has a burn-out , which is rather intense but can vary quite a bit from person to person. Then you say, two months ago I also felt a bit down but I also kept going. Not to take a burn out not seriously, because I think it is, but just to illustrate.*
> **Graphic 7, freelance**

> *Actually, I don't like it at all, a bread fund, to be honest. It's character is too temporary. They pay you for two years, and afterwards? So you end up in a wheelchair, the bread funds pays you but it stops after two years. That means you have the same problem, only later. It is only half a solution.*
> **Graphic 3, freelance 1**

Pensions

Pensions are not mandatory to provide to employees in the sector. The interviews showed that there is also no common practice as to how things are arranged within companies: one company provided pension build up within a traditional pension fund, another provided employees with money to arrange it themselves whereas a last group did not provide any pension arrangements at all. Reason for providing employees with building up a pension at a traditional pension fund was the explicit wish of one of the employees when entering the firm. This led to a discussion in the firm and the conversion of a yearly additional month of salary into a pension contribution. Reasons indicated by interviewed employers for providing employees with money to arrange it themselves, was a distrust of traditional pension funds and the wish to provide employees with freedom to arrange things how they believe is best.

> *It is not mandatory in the sector. But that just did not feel good. I do not want the troubles of a traditional pension fund. If they have a bad year, I – the employer – need to compensate. That makes me vulnerable. Now everyone gets a certain amount every month, which is growing, it indexes. I mention to them that it is meant to be for old-age arrangements. But if they want to spend it on going to a fun fair, it is their own business.*
> **Graphic 3, employer**

The reason employers gave during the interviews for not having any pension arrangements in place was the same as some of the interviewed freelance workers mentioned: they were planning to look into it, but until this moment it just had not been a priority.

> *It is something that we are not able to get off the ground within this company. We are all not really into arranging all these kind of things and arranging the finances. […]. In the creative sector we are all not really into these kinds of things.*
> **Graphic 8, employee**

An additional reason mentioned by freelance workers not to have it arranged was their relatively low earnings. They needed their fees to go up before they could start saving for their pensions.

> *At this moment I am not saving up, I am not thinking about my pension yet, that kind of things. I need to raise my fees in order to be able to start […] or I need more stable customers, overall I need more stability and a slightly higher fee. At the moment with a fee of 50 euro's an hour it should be possible, but with the 30, 35 an hour with which I started it was not possible to put money aside.*
> **Graphic 7, freelance**

However, other freelance workers do have pension arrangements. Generally, this meant savings in one form or another. They refrained from participating in traditional pension funds because they did not believe in their stability and preferred to keep matters in their own hands.

> *Most employers also had some pension savings in one form or another. However, as these savings often also function as back-up for fluctuations in the company it is quite vulnerable.*
> *I put money aside, but about 8 years ago we had quite a bad period, so the first thing that is being sacrificed are my own savings. So at all levels the savings are gone, both the companies' and my private savings. […] That is just because the returns have been so low in a certain period that I eat all my savings. That is just how it goes.*
> **Graphic 8, employer**

Although most of the companies interviewed did not arrange the pensions for their employees, most employees in the study actually indicate that having it arranged by the employer would be their preference. Employees feel confused about how they should arrange it and they do not take the time to really look into the possibilities. They, however, do not request their employer to arrange it, because they feel it is their own responsibility because it is uncommon in the industry to provide a pension plan to employees.

> *In principle, because I know that in this sector it is not common that the employer arranges it, I see it as my own responsibility. It would be really easy when it would be arranged by my employer. In other sectors I believe this is more common. In those cases the threshold to arrange it is really low, whereas if you have to arrange it privately, it is rather complicated. I do not really know where to arrange it.*
> **Graphic 8, employee**

> *At the moment I signed my contract, I knew that they did not offer pensions. So my first thought was to look into how to arrange it myself. But until this moment, I have not really done so. I notice that I keep postponing it. I am almost 28 now and I would really like to have it arranged before I am 30. That is a good deadline to have it arranged. But really I should arrange it this year. Because there is no sense in delaying it. It just feels good when you know that you are saving for the future. Now I notice that I tend to spend everything.*
> **Graphic 3, employee**

3.10.2. Earning money in the graphic design industry: wages, fees and earnings

Wage determination

The wages of the interviewed employees in the sector are often determined based on the BNO salary scales, which indicates that it indeed seems to set a standard in the sector. Employers state that they prefer to use the guidelines, because for them it is the easiest way to determine what a decent salary in the sector is. Moreover, they like that is creates a level playing field: they would not like their employees to leave because the conditions are better somewhere else. These are in other sectors the core functions of a collective agreement. This seems to indicate that the working conditions guidelines actually serve as a kind of collective agreement in the sector, but without being mandatory and without a formal negotiation process behind it.

Most employers we interviewed in the sector have a monthly amount that they reward themselves. They mostly state them to be modest in order to be able to invest money in their company. Although what is regarded modest varies per person and company. Fluctuations in the companies' success tend to reflect directly on their earnings: when earnings fall, their personal income is the first to be cut.

> *At this moment it is also a question of scarcity. You have an agreement with your employees and you stick to that. If someone gets less of the cake, it's us. But for us it is becoming an annoying situation. So it is something we try to do something about: not to*

> *have to spend our income on running the business but to have some spare money so we can actually spend a bit on salaries for ourselves.*
> **Graphic 1, employer**

Fee determination

The freelance workers interviewed base their fees on what they believe their work to be worth given the experience they have. They find out about the fees they can ask through google and through asking others in their network. When they gain experience, they tend to raise their fees. The fees also vary between skills of freelance workers: programmers are more expensive than designers.

> *I ask 50 euro an hour, because I don't have that much experience yet, so I do not need the very big customers for now. It would be nice, but I think, you know, at this moment I just want to gain experience and I think it is a fair price for what I offer. I mean, the quality is probably fine, comparable to what I would do when I would work as an employee of course and they would put me on 80 euro an hour, but no, I think this is quite normal.*
> **Graphic 7, freelance**

Interviewees indicated during the interviews that not all customers have an adequate budget available: you cannot ask the same fee to customers in the health care sector as to customers in business. Companies and freelance workers deal with this by varying their fees accordingly. Overall, the interviewees indicated that they try to find a good balance between good paying customers and customers that can afford less. Also, when a company can hire you for a large assignment with many hours, it is acceptable that the hourly fee is less because it means security in the work flow.

Low fees and earnings?

Overall, the workers we interviewed in the graphic design industry do not regard their earnings to be low. However, they mention some practices in the sector that make it harder to earn a decent income. First, they indicate that customers often try to lower the price. According to interviewees this is caused by customers not seeing the added value of their work: the lion share of the work that goes into designing is invisible. In addition, the interviewed workers blame the practice within the sector of easily agreeing to work for low fees. Second, the practice of free pitching also makes it harder to earn money: it causes them to put a lot of effort in assignments before even knowing whether they will get the job. Third, for freelance workers the possibility of getting work through platforms is seen as an equally bad practice as free pitching for the same reason: it takes already a lot of effort before you know if you get the job.

> *Our work is not always valued by the customer. This also has to do with the practices in our sector to agree to work for very low budgets or to participate in free pitching. […] Customers often think "we are a very cool company, so we can pay the creative less". And often the creatives agree to this. I think this is a disadvantage of working in the sector, the free pitching etc. But we also cause it to ourselves to happen. Customers that have a small*

budget available but nevertheless invite six different companies to develop a proposal. I think this is ridiculous.
Graphic 2, employer

That companies and freelance workers in the sector often agree to work for lower fees is, according to others we interviewed in the sector, related to their lack of negotiation skills. The freelance workers in this study also mentioned a lack of confidence in their own value as a reason to ask lower fees.

Sometimes I am a bit afraid that we ourselves are the cause that the value of our work is not 100 percent appreciated by others. If we keep agreeing [to lower fees, red.]. It is also related to creative people not being the best negotiators or best capable of making a strong stance and standing up for themselves. That is maybe also related to it. Also, if you graduate from art school and you start your own business, you have never learned how to do that, you need to learn it by doing.
Graphic 2, employer

I tend to give customers a reduction even before I give them the initial offer. I am afraid that customers will say that I am too expensive.
Graphic 5, freelance

It is important to note, however, that there seems to be quite a lot of variation in how difficult it is for entrepreneurs, employers and freelance workers in the sector to earn enough money. Based on the interviews, it seemed that especially for starting entrepreneurs and freelance workers it can be difficult. This is however not typical for the sector and can merely be seen as an entrepreneurial risk. The interviewed workers in this position indicated that for them it is acceptable, because of their expectations that the earnings will grow. Having low living expenses is the strategy for them to make the step into self-employment without savings or other back-ups. The interviewees also indicated however, that freelance workers that have gained experience can make a very good living in the sector: they are attractive for other companies to hire for projects and receive good payment in return.

Very crucial: when I started I was still living in a student room. The living expenses were low. I kept that up for two years. When my business took off I moved.
[…]
I have been a freelance worker for 6 years. And that always went very well. I worked for about nine months a year for 40 hours a week for a freelance salary. That is the income of a director. That was really nice. I have always put the money aside, because I didn't need it.
Graphic 3, freelance

3.10.3. Skill development (entrepreneurial and creative)

Most of the workers in the graphic design industry we interviewed have a background in art school. Afterwards, they keep their skills up to date. Most of what they learn is acquired by doing. Also new software programmes are mastered this way. Sometimes freelance workers and companies consciously take on assignments that require them to learn new skills and reserve extra time for to acquire these skills. In addition, they learn from each other while working in a team, or through working in different companies as a freelance worker. Internally, employees also learn from their bosses or more senior employees. Other strategies used to keep up creative skills are online tutorials and blogs. Besides keeping their creative skills up to date, getting new inspiration is also very important for workers in the sector. Seminars and conferences are ways of acquiring such inspiration.

> *It is about reading a lot of blogs, looking up information, self-study actually. And also for ourselves to keep up to date, for example to keep an open mind towards using new tools and practicing them on ourselves. Or to practice on a smaller customer to see how it works out in practice. And to find our own way of applying it.*
> **Graphic 1, employer**

The employers and freelance workers in the study emphasize that they did not learn any business skills in art school. They acquired these skills after finalizing their formal education. Learning by doing is the main strategy mentioned, where coming from an entrepreneurial family helps to get a feel for it. In addition, formal courses were used to get the necessary skills. Courses followed by the interviewees were offered by BNO, by regional organizations for freelance workers, on starters festivals and within their own creative hub. One of the interviewees also mentioned to participate in a coaching programme for starting freelance workers.

> *I am being coached by an entrepreneur for six months. […] I just asked around and told people like, you know, I just notice that, in the beginning being an entrepreneur just happened to me and through 2016 I acquired the passion and started to think being an entrepreneur is just something I enjoy very much, I would like to continue doing it. But at the same time it felt like I had to find my way there in the dark. I had no idea how to let my business grow in a professional way. And one of my customers just mentioned one time that he had been coached in the very beginning at an organization of retired entrepreneurs that want to support and coach starting entrepreneurs. So this is where I went to and now I am being coached by a man aged 68.*
> **Graphic 5, freelance worker**

3.10.4. Vulnerability?

In general, the workers we interviewed in the sector do not regard themselves as vulnerable. There are good career possibilities in the sector that allow you to grow from junior positions towards senior positions. Moreover, most of the employees are satisfied with their wages. Nevertheless, there are some areas in which workers feel vulnerable. First of all, employers mention their position towards clients. For the (often rather small) graphic design companies, it is hard to make a strong stance towards large clients. They often run into discussion or conflicts regarding copyright, with their clients simply refusing to agree with the terms and conditions set as a guideline by the BNO.

Especially regarding ownership and things like that. These have all been formally set, but large clients just ignore that. They don't have any problem whatsoever with doing that, especially the larger companies. If we work for larger companies, you have no idea about the amount of paper work and terms and conditions that comes with it. And if you don't agree with these, you just don't get the job.
Graphic 2, employer

Second, interviewed workers mention vulnerability with regard to the rather high competition between employees in the sector because of the large number of graduates compared to the number of positions available. This results in people becoming a freelance worker although this is not their preference, as not everyone succeeds in finding a job.

Third, freelance workers and employers mentioned during the interviews some sense of vulnerability with regard to their income. Some of them feel the sense of insecurity balances against the possibility of their company becoming successful and ending up with higher earnings than their peers. Others, however, feel an unbalance between their contributions to society as an employer and the financial risk they run personally.

Friends maybe have a higher starting salary, but what if –and that is why I do it- things keep going well? In that case things keep growing and in about ten years my earnings will be higher than theirs. I have better perspectives.
Graphic 5, freelance worker

It is the price you pay for being an entrepreneur and it is a price that feels unfair for us, because we work harder and feel and take more responsibility. And we create employment for others which we have to organize and secure. But at the end we do not profit personally.
Graphic 1, employer

Fourth, the starting freelance workers we interviewed mention insecurity around insurances and pensions. Their fees and consequently their earnings are too low to include those, but they feel in no position to raise their fees because of the competitiveness of the market and the (perceived) expectations of their customers.

There are enough options where you can arrange it [insurance and pension savings, red.] and companies that can help you do it so that everything is well arranged afterwards. But you don't do it because it will affect your fees. And especially in the starting phase, you feel it is a very competition sensitive part of your work. Like, if you are too expensive they will go to someone else.
Graphic 7, freelance worker

Fifth, workers indicated during the interviews that they feel vulnerable because of the sensitivity of the sector to economic fluctuations.

3.10.5. Industry needs

Related to the vulnerability felt by (starting) freelance workers in the sector with regard to social securities, all types of workers in the sector (not only the freelance workers themselves) mention during the interviews the need for collective arrangement of these securities. They mention advantages of collective organization varying from lower costs (because insurance is perceived as rather expensive) to better protection of workers in the sector (and other freelance workers in the economy).

> *I believe it is a responsibility of the government to formulate the problems much clearer and to communicate it much better to freelance workers, because it is just a very big risk. Yes, that is my opinion; I believe it is a danger. And I also think that freelance workers and entrepreneurs or one-person companies, they have enormous tax advantages. […] But I actually believe it would be okay to install a threshold, to say, okay you may get these benefits but in order to get them you need to take care to have these things arranged. That is currently not the case. That could be a solution. Another solution would be that the government would arrange a general insurance and a pension scheme for the large group of freelance workers.*
> **Graphic 3, freelance 1**

Another need felt by the sector is a greater representation towards the outside world. Interviewees indicated to see the need for a go-to organization when other sectors want to address the creative sector. Also a more pro-active approach towards connecting companies in the sector with entrepreneurs in other sectors would be valuable according to employers in the sector in order to broaden their reach and pool of customers.

Finally, the need was mentioned by interviewees to raise the level and quality at art schools. They feel that with the increasing popularity of the graphic design educational programmes, the quality has reduced. It is hard for them to find employees with the skills they need.

> *For us it is just very difficult to find good interns or good designers, just because there are far less good designers available. The level needs to increase, also on art schools. […] I understand that art schools need to attract students in order to get their funding, but is leads to many students graduating that are not necessarily good designers and never will be… To my opinion it would be more honest to say at an early stage that this is not the direction for them*
> **Graphic 3, freelance 1**

3.11. Conclusions

The graphic design sector, in terms of interest representation, departs clearly from the traditional Dutch system since trade unions and employers' organisations play only a minor role and there is no collective agreement that sets wages and working conditions. In this sense, it belongs to the unorganised part of the creative sector. Rather, interest representation is organised on a professional or occupational basis with the BNO as the major actor. This type of interest representation focuses on representing the sector as such and makes no principle difference between employers, employees and freelancers. This stems in particular from the blurred boundaries between the various employment statuses. At the same time, the BNO does produce a set of voluntary guidelines concerning remuneration and working conditions in the sector, which is used quite extensively. It acts as a voluntary collective agreement that is not legally binding.

The persons working in the sector are in general highly intrinsically motivated, which leads them to prioritise being able to work creatively in the type of work they like above getting the most monetary value out of their work. Also, the share of freelancers in the sector is very high, slightly higher than the share of employees, making traditional interest representation again more complicated.

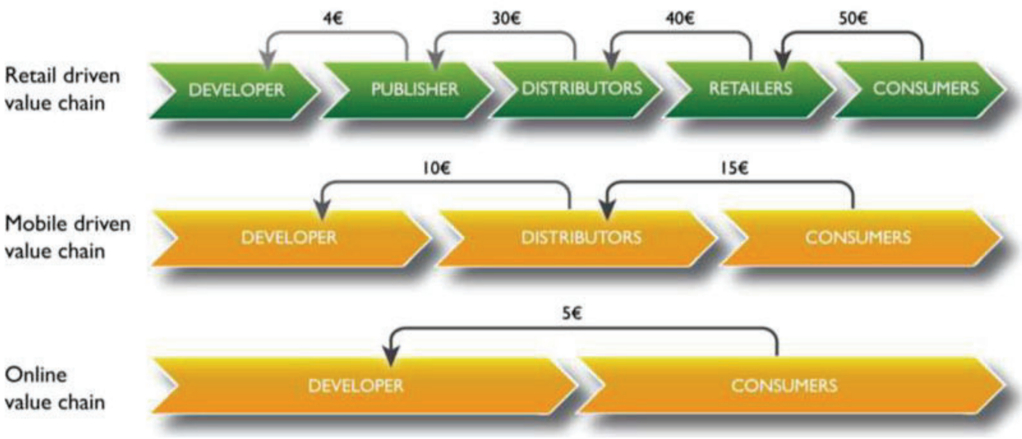
The people working in the graphic design sector do not necessarily consider themselves to work in precarious conditions and see sufficient opportunities to earn a decent living. It remains a question to what extent this view is coloured by the dominant aspect of wanting to work in this sector. Many of the freelancers did not really choose to be freelancer but saw this as the only opportunity to be able to work in the sector. The high share of freelancers has led to strong competition and hence relatively low fees, especially for starting freelancers. Also small entrepreneurs and again especially starting entrepreneurs often earn very little while trying to conquer a position in the sector. And many people in the sector have only limited social security entitlements in terms of insurance against unemployment and disability or occupational pensions. Some of these factors point to an objective state of precariousness but for the persons active in the sector this may be offset by the intrinsic value of the work they do.

4. The games industry

4.1. Description of the sector: evolution and trends

The game industry includes all companies whose core activities include at least one of the following processes in the value chain: the development, production, publication, facilitation and/or electronic distribution of electronic games. The value chain of the game industry has transformed in recent years. The classic retail-driven video games value chain used to be long and composed of about 5 phases from development to consumption (see: Figure 4.1). Nowadays, designers of mobile and online games have reduced their value chain, which allows them to release their games in a short time and to approach their final customers directly.

Figure 4.1 – Overview of the Most Common Value Chains in the Video Game Industry



Source: BOO-Games, 2013.

The Dutch gaming industry is a young, fast-growing and dynamic story. It consists of three main groups. The first group of developers started the first specialized studios of interactive entertainment video games already in the 1990s. Some of these video-game-focused studios went bankrupt; others merged or were acquired by foreign media and entertainment companies (Nieborg and De Kloet 2017). The main example here is Guerilla Games, acquired in 2005 by Sony, that in 2017 launched Horizon Zero Dawn, a blockbuster game for PlayStation. The second group is represented by smaller companies which are part of the mobile-driven and online value chains. There is a rise of independent (or indie) game studios - small companies consisting of one to a maximum of five people. Most of these studios produce games for mobile platforms (iOS, Android, Windows Phone). They require lower up-front investments and thus fit better the requirements of new markets (with short value chains and quick product obsolescence) if compared to the environment of video game blockbuster production, with high entry costs (that can engender higher turnouts, BOO-Game 2013). The data from the Game Monitor (Koops 2016) show a huge success between 2010 and 2015 of developers focused on production for mobile devices.

The third group is composed of the creators of applied games. Applied games (also referred to as serious games) are games with the aim to inform, educate or train end-users. Applied games are developed for a wide range of sectors including education, health, transport, marketing, and defence. Serious games represent a peculiarity of the Dutch gaming sector. Serious game development is a particularly knowledge intensive segment, as it requires input of highly knowledgeable domain experts (Nieborg and De Kloet 2017). The company that marked the beginning of the development of applied games started in 1997 when three Dutch visual designers who studied at the University of Applied Sciences in Utrecht came together and founded IJsfontein. The studio’s first project was Meesters van Macht (Masters of Power), a CD-ROM-based game aimed at a younger audience (9-14 years old) and marketed as a serious game. Leveraging the problem-solving nature of games as interactive media, the objective was to promote learning about physical phenomena such as light and sound through play (Nieborg and De Kloet 2017). Beyond commercial success, it demonstrated the potential of non-entertainment games for the Dutch gaming industry. This segment today makes up a very large share of the gaming sector, much larger than in other countries.

Table 4.1 – Key indicators for the game industry value chain, 2015

	Companies	Jobs	Turnover (mln euros)	Jobs, change 2011-2015	Company, change 2011-2015
Game Producer	352	1,865	115-145	410	107
Game Producer/Publisher	19	320	–	-80	8
Publisher	23	275	15-25	25	0
Distributor	11	185	10-20	30	0
Technology suppliers	10	230	10-20	-115	0
Service provider	40	155	5-15	25	19
Total	**455**	**3,030**	**155-225**	**300**	**134**

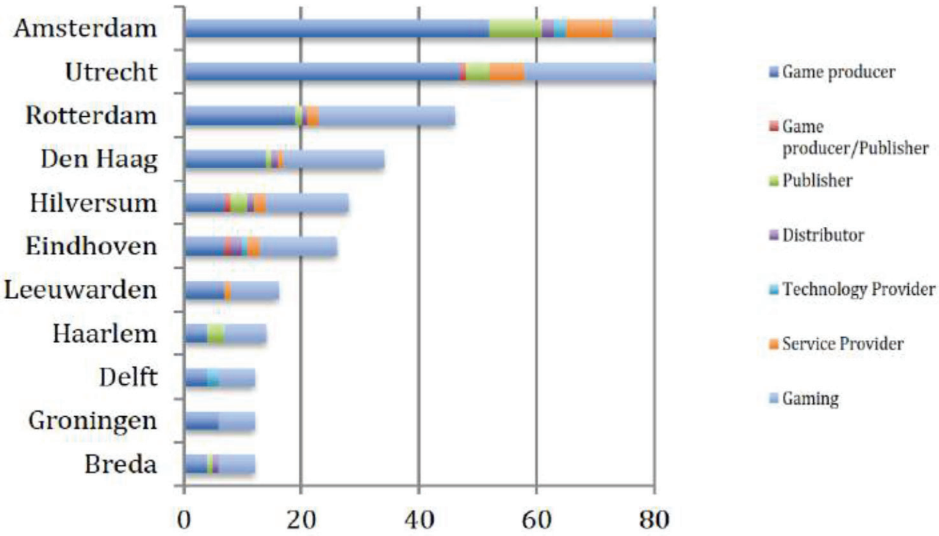
Source: Game monitors, 2015.

In terms of jobs, 41% of the workers in the game industry work in the applied sector, 46% in entertainment, 8% in companies that combine the two and 5% in asset development. The estimated total number of jobs in the games industry in the Netherlands is 3,030 (see: Table 4.1), and has shown an annual increase of 2.6 percent between 2011 and 2015 (Koops 2016)[22], which is well above the national average of -0.4 percent. The total revenue expected for 2018 is 596.5 million euros. The number of companies in the sector has increased rapidly over the years: from 320 companies in 2011 to 455 in 2015 (an increase of 42 percent). This also means that the companies in the sector are generally very small and very young: more than half of the game companies is less than four years old.

The number of women in the games industry is very low. Game companies say that, on average, 13.5% of their employees (permanent and freelance) is female: indeed the games industry is very much a man's world (Game Monitor 2012). As in other European countries, also in the Netherlands the gaming industry is characterized by the presence of numerous small studios, with about 7 employees on average in 2015. Compared to other creative industries, the number of freelancer workers and entrepreneurs without employees is relatively limited. The Dutch game industry has most jobs in small (11 to 50 employees) and very small (10 or less employees) firms.

[22] It is rather difficult to map the dimensions of the sector, since the data collected by the Dutch Statistical Office do not allow to break down the NACE code "Game Industry". The most reliable source of information is the census survey developed by the Taskforce Innovation Utrecht Region.

Figure 4.2 – Number of companies of the Dutch Games Industry per City in 2011



Source: BOO-Games, 2013.

Geographically, Amsterdam is the main games city, followed by Utrecht (see: Figure 4.2). The leading role of Amsterdam is linked to the early establishment of two large companies in this city. In 2001, Playlogic Entertainment was founded, soon employing 115 developers and another 55 people in its staff. While the company then disappeared, it signaled that Amsterdam was a place where these type of professionals could go, and grow. In 2000, another company, Lost Boys Games (now Guerrilla Games) was founded. Guerrilla Games was acquired by Sony in 2005, and with the acquisition large investments came into games development (also through recruitment of professionals in the sector). Today, Guerrilla Games is by far the largest game company in the Netherlands. In 2017, Amsterdam's game industry had 800 jobs divided over 89 game companies. Other important game companies in Amsterdam are Vanguard Games, Orange Games, Perfect World Europe and IJsfontein. Games companies are spread across different cities in the Netherlands. Utrecht is the second largest if one considers the number of game companies in the area. The majority of Dutch Game companies can be found in the near vicinity of game related education centres, which help to create a positive climate of learning and research on games, and the availability of appropriately educated employees. Utrecht has several important educational institutions like Utrecht University, Utrecht School of the Arts, Hogeschool Utrecht and Grafisch Lyceum Utrecht that offer degree programs and courses on games and game-related subjects. The Utrecht School of Arts was the first to offer formal education in the gaming sector.

Today, 44 educational institutions in the Netherlands offer game-related programs - 5 in research universities, 17 in universities of applied science and 22 in institutions of vocational education - and the number of game students is growing every year (Game Monitor 2015).

Another thing about the Dutch games industry is that we have an extremely large amount of education programs focusing on games. We are a very small country but we have 44 game programs/majors, minors, courses, part-time studies, but that is insane. Most countries I know of, they have one or two. Some have none.
Representative of a service provider, games industry

The annual outflow of all game students in 2015 was 1639 (see: Table 4.2). Out of these, 991 students graduated from full-time study (both secondary and higher vocational education and universities), and 648 students completed either a game minor or a game course. The total number of game-related minors and courses increased from 9 in 2012 to 22 in 2015 (Koops 2016). There are large differences, then, among graduates in the broad sector of gaming. One of the elements that emerged from interviews is that employability (in the game industry) largely depends on the background and the specific type of education received. Technical skills are particularly prized, while producers of contents have more uncertain job market perspectives.

Table 4.2 – Estimated outflow of game students by knowledge institute, 2015

	Full-time: majors and masters	Part-time: Minors and courses	Total
Research University	189	257	**446**
University of Applied Science	433	391	**824**
Vocational education	369	–	
Total	**991**	**648**	**1,639**

Source: Game monitors, 2015.

The Game Monitor (Koops 2016) shows that roughly 30% of the full-time alumni are working in the gaming industry. Another 50% of the alumni work in the broader creative industry (media companies, advertising industry etc.), while the remaining 20% of the full-time alumni work outside the creative industry (for instance in software companies, healthcare etc.). Indeed, there is an oversupply of graduates in games studies and not enough jobs to absorb all of them.

4.2. Interest representation

The traditional industrial relations actors play a limited role in the games industry. There is not employers' organization and the trade unions are not particularly active in the games industry. There is no collective agreement and wages, fees and working conditions are set by legislation and negotiations between individual companies, workers and freelancers. The trade union Kunstenbond, which is active in the Graphic Design Industry, does not focus on the games industry. Trade unions in general indicate that it very hard to get members in the industry.

It's hard for us to reach these people. We try to get a foothold in the gaming industry and young self-employed, but it's very difficult to reach them.
Representative of a trade union

Alternative ways of organizing are therefore more important than traditional organizations. The Dutch Games Association (DGA) is the main professional organization for both workers, freelancers and employers in the games industry. It exists since 2008, and in its own words "picks up everything that is of mutual interest, that is really important but that nobody else will pick up" (interview with the DGA). They represent the industry towards other sectors, the government and internationally. The DGA feels this is their most important task, rather than for example the provision of services to individual members, and it is something that was not done so much before its existence.

> *In my opinion, it was a closed industry with people, a tight community, where people like each other etc. etc. and they cooperate very well, but not towards the outside world so much. […] maybe it's the type of people that developers are, not so open, and more into themselves, right, even a little bit autistic. It's really true. Maybe it has to do with that. I'm not sure, but we want to break that open because we have a really interesting industry and the world should know it.*
> **Representative of a professional organization, games industry**

The second task which the DGA has taken up is providing members with information on how to develop games. In addition, the DGA organizes events, often subsidized by the government, which support the build-up of the DGA (based on the interview with the government). The DGA finds that it is hard to get members and observes that members and potential members not always see the value of what the DGA can offer. One of the causes they see for their difficulties to get members is the extent to which game developers, and especially indie game developers, value their autonomy: they want to be independent of everything including organizations that represent their interests.

> *I think, the really small ones don't want until now, find it hard to organize in this way, they are independent, and they are independent to everything. So they are not members of us.*
> **Representative of a professional organization, games industry**

The organization is now moving more towards business oriented services and promoting the industry and its products.

> *Before I joined the organization, the DGA was much more oriented towards developers, how to develop a good game. In my opinion, this is not where the problems are. We know very well how to make good games and developers know where to find each other. There are no issues in this area. The issue is: we have a nice game but we do not get it sold. This is where we want to step in in the future.*
> **Representative of a professional organization, games industry**

Another central organization in the industry is the Dutch Game Garden[23]. It was set up in 2008 and is a local hub for starting game companies. It was initiated by two local education programs[24] for game development, upon their realization that their graduates needed support in setting up their own companies, as this was the career path

[23] See: https://www.dutchgamegarden.nl/locations/utrecht/.
[24] Utrecht University and Hogeschool voor de Kunsten Utrecht together.

many graduates took. They now house game developers in hubs in Utrecht, Breda, Hilversum and Enschede and offer an incubation programme for promising young game studios. Within this programme participants are coached in setting up a game company: they have a mentor, can follow classes on business topics and participate in team training. The location in Utrecht currently houses 26 companies. Moreover, the DGG organizes events and projects and provides a place where game developers and companies can meet. If requested, the DGG can also negotiate with publishers on behalf of the companies housed by the DGG or go over contracts to check the content. Finally, they act as a mediator between companies that want to contract a game studio and the (often small) game studio's.

> *Sometimes a company like Apple or Nintendo approach us and then they say, "we would like to meet Dutch game developers, and we hope that they want to publish their games on our platform." And so we tell them to come over. For example, every company gets 30 minutes to pitch their game to them. That is really valuable because that might lead to…for example, for my own game; it led to a feature on the store front page of Apple. That was really useful. And that might lead to more deals.*
> **Representative of a service provider, games industry**

4.3. The case studies

Six companies and three freelance workers took part in the study (see: Table 4.3). They are located within the cities of Utrecht and Amsterdam and employ between 2 and 44 people. None of the companies included in the study are covered by a collective agreement. Of the companies interviewed, most are not a member of the Dutch Games Association.

Table 4.3 – Interviews at the sectoral level: the games industry

	Organization	Who interviewed	Size[25]	Member of DGA	Covered by CA	Location
1	Games 1	1 employer	28	No	No	Utrecht
2	Games 2	1 employer	12	?	No	Amsterdam
3	Games 3	1 entrepreneur[26]	4	No	No	Utrecht
4	Games 4	1 employer 2 employees 1 freelance	6	No	No	Utrecht
5	Games 5	1 employer 2 freelance	2	No	No	Utrecht
6	Games 6	1 employer 2 employees	44	Yes	No	Amsterdam

[25] Freelance workers hired by the company are not included in the size of the company.
[26] With entrepreneur we refer here to owners of a company with several owners but no employees.

4.4. Sector developments

The interviewees in the games industry pointed to several important developments in the sector and their work during the last decade. Important factors have been digitalization, economic fluctuations, an increase in the number of graduates and relatedly a change in the balance of employments forms in the sector.

4.4.1. Digitalization

The interviewees mention that the advancing digitalization in recent decades resulted in lowering the barrier to working in the games industry and to starting you own company, because it became possible to programme a game without very advanced programming skills. The availability of free game engines helped this development, as these are basically software programs that enable you to build your own game without a lot of deep programming knowledge. In addition, because people can publish their own games for example for IOS or Android on the internet or within an app store, having a publisher for your game has become less important. The interviewees also expressed that for a while, using a publisher was seen as something unwanted by many smaller indie game developers. Publishers were perceived as giving bad contracts to game developers, "ripping them off". However, this image has faded as game developers experienced it is difficult to become successful independently.

> *The funny thing is that around 2008, people realized that we don't need those publishers anymore. Publishers are evil. They have bad contracts. You get ripped off. We don't need them anymore. We can now self-publish, and then everyone started doing that and you're not visible anymore. […] Yeah, and now people really want to have a publisher again because they can't make it on their own with just 5 people. If they focus just on developing games, who is going to do the business?*
> **Representative of a service provider, games industry**

Interviewees mention that the downside of a more accessible industry is that it has raised competition, because many (small) companies entered the market, which has made it more difficult to survive in the sector and to have your game noticed by customers. This is reflected in a high company turnover in the sector.

> *So it became so much easier to develop the games and to publish the games. Of course, that also leads to a bad visibility on the App Store. If you are publishing a game on IOS now, you're not going to be successful by just publishing it because there are so many games.*
> **Representative of a service provider, games industry**

4.4.2. Economic fluctuations

The games industry is strongly affected by a fluctuating market: when the economy is doing well, companies and consumers are willing to spend money on "fun stuff" like games, whereas it is one of the first things they cut when the economy is doing less well. This was especially noticeable during the recent crisis. But now that the crisis is over, the sector is doing well again. Still, the crisis has created a high level of uncertainty.

4.4.3. Rapid increase of educational programs

As shown earlier, the Netherlands has, compared to other countries, a large number of games-related educational programs. It is a very popular subject among students combined with a funding system based on student numbers which creates incentives to expand the supply of these programmes. Opinions vary within the sector whether this is a good development or not. Some say it helps the sector to grow because many of the graduates start their own company. In addition, they argue that it is no problem that not all graduates can be employed within the sector because the skills taught are also useful in other sectors and it actually facilitates spreading the idea that games can be used in other sectors. Others, however, state that it is a problem that there are many more graduates than positions in the industry, because it creates false hopes among students and increases competition in the industry, leading to the lowering of standards.

4.5. Employment forms

Due to the digitalization it became much easier to start one's own company. As a consequence, there is a wide variety of workers active in the games industry nowadays. Next to the traditional roles of employers and employees, there are freelance workers and (starting) entrepreneurs who have their own indie game company either alone or together with partners. However, this distinction is not clear cut as many workers in the industry combine several roles. For example, employees have their own side-projects which they develop independently besides their job. Their motive is the wish to develop their own game and they hope that this will turn out to be a highly successful game so they can earn enough with their own projects in the future. But even if this will never happen they are motivated to develop their own ideas. The combination of being employed by another company and having their own project gives them the freedom and security to develop their own project relatively risk-free. Also freelance workers often divide their time in a similar way: they work for hire during the majority of the working week but do their own projects in the remaining time. Freelancers state that this is what they like about being self-employed: they feel more freedom to develop their own projects.

> *Besides the three, four days a week I am employed here, I have one day a week that I work on my own project. I like this balance. In this way, I can safely try it out without running too much risk.*
> **Games 4, employee**

Nevertheless, some interviewees indicate that being a freelance worker is not always a free choice. There are few jobs available and there are many people that want to work in the industry. Being a freelancer is a way to work in the sector in such a context. However, there are relatively few freelance workers in the sector compared to the rest of the creative industry. In 2015 about 5 percent of the companies were a one-person company and about 70 percent of the workers in the industry worked for a company with more than 10 employees (Koops 2016).

Some of the small entrepreneurs interviewed also argued that they are deliberately staying small as a company. They prefer to increase the size of their company temporarily if a project requires them to do so by hiring temporary employees, by using freelancers or by collaborating with other companies in project-based coalitions. Keeping the company small reduces the risk and enables it to more easily respond to fluctuations in the economy and available work. Moreover, it gives them more freedom to change the course of their company ("do something silly") and to change their approach whenever they feel like it. This is at the same time a preference as well as a perceived necessity: because the games industry is rapidly developing and business models change often.

> *It is a sector that completely reinvents itself every three years, it used to be every seven years but now it is every three year. All business models are different afterwards.*
> *[…]*
> *To keep that creativity, it is much better to work with project financing than to have permanent employees. With permanent employees, you have the responsibility of keeping the company going and financially healthy which means you cannot take big risks. You can't say let's do something completely different and crazy now.*
> **Games 5, employer**

Others, however, prefer to have (permanent) employees, because they feel more committed to the organization and are more passionate about it. Moreover, it is cheaper to have employees than to hire a freelancers, especially when the company has work for a longer period secured. Also, it helps to attract and keep good employees in the organization. There seems to be a tendency towards this latter way of thinking in recent years in Europe (Keune *et al.* 2018). In particular in the larger companies most employees have permanent or longer-term contracts, but also in more and more smaller companies.

> *I think that our permanent employees are more driven, I can see the difference. A freelancer is more distant from your own organization and has different interests.*
> **Games 6, employer**

4.6. The characteristics of working in the sector

Work and workers in the game industry are often argued to have specific characteristics, which affect working conditions and earnings. In this paragraph it is first discussed how the interviewees characterize working and workers in the sector and second, whether they observe a trade-off between job characteristics and earnings.

4.6.1. Job and workers' characteristics

An important characteristic of especially entertainment games is that one hopes that one's game will "go viral" and become a big success. Although there are relatively few games that really become a big hit, the possibility is still an important driver for the workers in the sector. A related aspect of especially the small indie game developers is that they value autonomy and want to be able to independently develop their own ideas. They want to do so without a customer, a boss or a publisher telling them what to do, because this will hinder them to do "completely their own thing". It are the indie game developers that mention this preference to be most central to their way of working, but also the company owners of the bigger games studios want to maintain their autonomy in shaping the direction of the company as well as the games they develop. In addition, it also plays a role for the other workers in the sector on an individual level: they have often their own "indie" projects besides their jobs or assignments.

> *If somebody says here, I have got 10 million euro for you, it still means you will have this nasty man with a tie opposite you that hands you the 10 million and wants to have a say in our work. I wouldn't want that.*
> **Games 6, employer**

> *I have the freedom to work on my own projects. That is very important. It is my goal. To be able to develop my own projects in the end and to make those generate money. To live from my own projects, to realize my dreams. That is very enjoyable.*
> **Games 5, freelance worker**

The interviewees mention that most of the workers in the industry share a huge passion for what they do. They state it is more than just work, it is also what they like to do in their spare time. Most of them have been involved in making games or developed a passion for games from an early age onwards and have always wanted to make it their profession.

> *Since I was young I have always wanted to work in the games industry. When I was about 8 or 9 or 10 years old, I thought this is kind of nice. I had RBG maker, a free program you can use to create our own games, and I was drawing all kind of pictures in Paint and making up stories. […] I really enjoyed doing that. I continued when I was a teenager and that was when I thought, yes, this is what I want to do for a living.*
> **Games 4, freelance worker**

The games industry being an industry depending on intrinsic motivation also leads to people putting in long working hours in some cases. The interviewees gave several reasons for this. First, when you develop a game and it is your passion, you want it to be perfect upon release. This means that the final phase takes a lot of time perfecting every aspect. In some cases, this leads to "crunching" during this final stage: working very long hours, up to 80 hours a week. However, owners of the slightly bigger companies that we interviewed express that they have adopted management strategies (Scrum) to better manage their projects and avoid crunching. A second reason for working long hours is that people take on additional projects besides their regular jobs, because they think it is a cool project. In these instances, the passion for game development leads to workers taking on large workloads.

> *Sometimes I am tempted to take on additional projects in my spare time. Sometimes someone develops a game and we take that on in our free time, in the evenings. Or pizza sessions during which we brainstorm together in the evenings. We all do that on a voluntary basis, just because we really like to do it. But it does add to the pressure. But the atmosphere is good and because I sincerely like doing it I am tempted to do it, but it are unpaid hours.*
> **Games 6, employee**

The passion of workers in the sector for what they do also leads to a high intrinsic motivation. They work because that is what they like to do and because they feel it is the best job that they could possibly have.

> *Definitely the best sector to work in. You are allowed to invent new things, try them, create them, and then something happens, other people enjoy what we have been developing. I can't think of something better than that.*
> **Games 1, employer**

Many of the interviewed workers in the industry mention the good, creative and informal atmosphere as important attributes of the sector. They also like the fact that there are a wide variety of things happening that are really innovative and new. However, or maybe because it is a vivid industry, there is a lot of competition. Many people are competing for the scarce jobs and assignments. The competition means that their portfolio is very central. Having worked on a project within one of the bigger game companies is very good for your portfolio, which means that these jobs are really popular.

> *We are such a great company, if you have worked for us for a certain period it is like you have been playing for Ajax.*
> **Games 6, employer**

4.6.2. Trade-offs between earnings and other job characteristics?

Our interviewees stated that many start-ups in the sector have very little income. This fact, combined with the strong competition in the sector and the wish of many to work in it, means that workers get involved in doing work for the start-ups for very little or no money with the prospect that only if the company will be successful and money will come in, they will get paid. Sometimes this is indeed the case, sometimes not. Workers agree because 1) they feel they have no other choice and need the job, 2) because they want to invest in the relationship with the company and 3) because they really like the company and/or project and want to contribute.

At the moment I work for two start-ups. […] They do not have a lot of budget, which means that you have to lower your hourly rate to increase the chance that they will hire you for a longer period of time.
Games 4, freelance worker

We had one experienced sales person that did it based upon a personal investment. He took the risk to start unpaid because he thought it was a really cool idea and wanted to do something for our target group. He said, you can start paying me when things work out.
Games 1, employer

The intrinsic motivation of people to work in the sector is an important reason they are settling for lower earnings. For them, money is not the most important motivator to work in the sector. They stated during the interviews to be satisfied as long as they are able to pay their living expenses: the type of work they do is far more important. Also the companies know that a high salary is not the essence to attracting employees and will rather invest in other working conditions, such as a nice working environment and interesting projects.

I think that at a company like [name large game company], it was more important for me to be able to put that name on my portfolio than to be able to get a certain amount of money.
Games 4, employee

I think it is really beautiful that the things we do here contribute to a slightly better world. Or teach people something. Or just contribute to a good product. That were very important reasons for me to say, OK, I am willing to earn less money.
Games 6, employee

Not offering a very high salary was also mentioned by some of the employers as a strategy to select the sincerely intrinsically motivated people. A wish to earn a high salary was seen by these employers as a signal that the worker does not possess the qualities that they desire in an employee: they perceived them as not motivated enough and having a too relaxed attitude towards the work.

Also during job interviews, this is something that we discuss intensively. We want somebody that really choses this company. You do not choose us because you want to earn a lot of money, but you choose us because you really support what we are doing.
Games 5, HR manager

I felt guilty at first that everyone had to take a step back, but at the same time it was convenient, because I want the intrinsically motivated people that really, really want to do something for our target groups. It became a kind of test or check to see whether someone is willing to give up earnings by choosing this job.
Games 1, employer

The characteristic of it being a portfolio industry leads to employees caring less about their earnings in a certain company and more about what the work will add to their CV. In practice, this means that they do not really negotiate, but just accept the offer.

Moreover, the abundant labour supply gives employers a lot of choice and also possibilities to pay less or offer lesser working conditions. If somebody refuses, there are others willing to do the job. This is especially true for starting positions, because gaining work experience is really important for your portfolio and your future chances in the industry. People are willing to take these positions for no or little earnings. Interviewees mentioned as an example whole projects/companies relying on interns to get a project done while paying them nothing or very little for 40 hours a week.

Companies sometimes also see low wages and fees as unavoidable as it is really hard to earn money in the industry. The interviewees partly blame the lacking business attitude and business skills of freelance workers and entrepreneurs in the sector. They are often motivated and very good in the work they do, but find it difficult to sell their game. Interviewees state that this is caused by a lack of interest for the business side of things, a lack of talent for sales but also lacking skills because educational programs do not tend to pay attention to business skills.

> *They are really, highly intrinsically motivated, so they can't think of anything else than making games. They love doing that, and in that journey where they want to build beautiful games, they really forget about business, and some of them even hate to do it.*
> **National 5**

Interviewees indicate that the "culture" of indie game developers, and the expectations of their particular group of customers make it hard for this group to earn money. The games that are developed by indie studios are often offered for free on mobile devices. They earn money by offering add-ons to the games for pay or through advertisements. However, allowing advertisements in your game is often seen as "not done" among indie game developers, which leaves them fewer options to earn money. Also games for other devices, like PCs, which are generally paid, are often cheaper when produced by indie game developers, adding to the difficulties to generate earnings.

> *For Indie developers, it is a taboo. Advertisements? You wouldn't think about having advertisements in your game, surely? It is a moral issue. And having app purchases to increase the content of the game, it is like the devil for some. That makes it really hard.*
> **Games 5, freelance worker**

Despite the financial difficulties many Indie game developers run into, the strong preference to be able to do "your own thing" makes up for it: their earnings are sometimes even below the statutory minimum wage level, but for these developers the autonomy and the possibility to work without concessions is worth the low earnings.

4.7. Traditional and alternative forms of voice and representation

Traditionally, in the Netherlands trade unions and employers' organizations negotiate in a sector to determine working conditions. As already stated, these traditional organizations play almost no role in the sector. In this paragraph, we discuss the role of representation for the interviewees. Overall, the interviewees were not very familiar with interest representation, the organizations active in the sector or what interest organizations could potentially do for them or for the sector. When asked questions about collective interest representation, many indicated that they had never thought about it nor they considered becoming a member of an organization. None of the interviewees was a member of a trade union. Many had never thought about it or did not really know what a trade union does. Others did not see the added value of becoming a trade union member. Also, there is no specific employers' organization for the games industry. The employers we interviewed in the games industry did not see any need for an employers' organization in the sector or never considered whether it would be helpful or not.

There is one main alternative interest representation organization, the Dutch Games Association (DGA). The DGA is not a unions or an employers' organization but a the professional organization aiming to represent all people that work in the games industry. It has both companies and individuals as members. Some of the interviewed organizations are a member but most are not. Some of the employees are a member on an individual basis while the organization they work for is not. Reasons for companies to be a member are legal assistance and knowledge transfer: at the DGA work people with a lot of knowledge about the industry. Individual workers indicated to have become a member because they were curious about the organization. Reasons mentioned for not becoming a member are the costs of membership and the feeling that at the moment membership would not be fruitful for them. Also some of those that are a member, questioned the usefulness of a membership for them personally although they subscribed the importance of having such an organization for the overall industry. Both members and non-members expressed that they feel they have a lack of knowledge about what the DGA actually does.

According to the DGA itself, it has been hard to interest the small organizations in the industry to become a member of the DGA. The reason according to them is that these small companies want to be as independent as possible which include independency from any kind of (interest) organization. Also freelance workers are hard to attract to the organization. The DGA suspects that this group of workers will organize itself, but will do so through technological means like platforms and discussion boards rather than through membership of an interest organization.

The Dutch Game Garden (DGG) is also seen as a kind of interest representation organization by the sector. They provide services that are seen as valuable to the sector, such as incubators, network events and seminars. Moreover, they increase the visibility of the sector because they are present on many events.

When asked, most interviewees in the sector indicate that they have never missed collective interest representation in the sector. However, some indicate that they miss a clear organization to be contacted when organizations from outside the sector, for example potential customers, want to find out more about the industry and its products and services. Some organizations already more or less fulfil this role, but the interviewees feel it has been organized rather haphazardly. It is also suggested that this organization should take up the role of promoting the games industry within other industries to convince them that games could help them, as not all sectors are familiar with the possibilities of cooperating with the games industry (yet).

> *I would like more connections or more structure, to strengthen the infrastructure between potential customers and the people in the industry. For example, we have a Facebook page, but that is just…. volunteers set it up and it just does not feel like a professional structure or like something that people have thought through thoroughly.*
> **Games 4, freelance worker**

The opinions in the sector about the need for a collective agreement vary to a large extend: some see a real need whereas others feel that the sector does not need one. There is also a group of interviewees that have never considered it and do not have an opinion about it. There are no real central topics that emerge from the interviews as issues they would like to have regulated by means of a collective agreement, although stress reduction was mentioned a couple of times.

> *I think it would be helpful to have certain agreements that will apply to everyone, or for employees at least will be a kind of safety net to fall back upon.*
> **Games 4, employee**

> *I would like to plea for maximum freedom for the individual. Only a person itself can know what is best for him in the end. You can never ever organize that centrally.*
> **Games 5, employer**

Many of the interviewees in the sector also indicate that they are not familiar with the top sector policy of the government. Others, however, know about it and see the benefits of it. Benefits mentioned are for example that events are facilitated and organized. Nevertheless, they mention that the policy is focused on a certain part of the creative sector and that they do not see a direct benefit for the sector at large, for example in terms of stimulating the expansion of the sector.

4.8. Day-to-day realities at the workplace level

An important role of trade unions and employers' organizations in other sectors of the economy is the formal arrangement of certain social security benefits, the setting of wage scales, arranging on-the-job learning etc., generally in the form of a collective agreement. The absence of active involvement of the first two and the absence of a collective agreement leads to question whether and how workers have arranged the issues mentioned. In this paragraph we look into this question and conclude with the question whether workers feel vulnerable with regard to working conditions.

4.8.1. Social security

Not many employers or freelance workers in the games industry have formal insurance for illness or incapacity to work. An important reason is it being too expensive for them. However, just as important is that people have not really considered it yet. They are willing to look into possible insurances, but insofar it has not been a priority. Others state that they have considered it, but decided it to be unnecessary for them: the level of basic social security in the Netherlands is high enough to serve as a fall back option for them. However, those with a family state that this is a reason for them to have an insurance. They feel responsible.

> *In the case I will become incapacitated, I will find a solution or someone in my family will find a solution. It is bad enough in itself. In such a scenario everything will change and the new situation will become the focus of my life. Do you understand? Of course, it will be hard, and maybe it would be less so with an incapacity insurance but I doubt it. In the case I will be on social assistance, that will be enough for me to survive. At the moment I am not spending more than the amount of social assistance I would receive. I feel that I would be able to solve this kind of situation.*
> **Games 5, freelance worker**

Not all employers in our sample have an insurance covering illness and disability of their employees. For some (mainly small) employers, having employees on short term temporary contracts is the main strategy to cope with the risk of long term illness or disability rather than insurance. Bigger employers with permanent employees tend to have insurance.

The largest organizations included in this study have a pension scheme for employees, are in the process of setting it up or are discussing it internally. They indicate that it has recently become relevant in their organizations, because the population of employees has become older and entered new live phases. In addition, employers that have started to hire (slightly older) employees coming from other sectors indicate that those employees expect a pension scheme to be available, because it was provided at their previous employers. For those employers, the provision of a pension scheme is a way to attract these experienced people to their organization.

> *For a long time it was not an issue that we addressed and discussed, not us as employers but also not our employees. An important reason is that 10 years ago we had many young employees that recently graduated and were absorbed in the work itself. But currently they start to have their own houses, children, these are moments that you start to think about it. Since that moment it has become an issue, at least it has become an issue that we decided to take care of.*
> **Games 2, employer**

The smaller employers interviewed indicated that they have a preference for a higher salary for employees rather than a pension scheme, their arguments being that they “do not believe in the official pension funds in the Netherlands” and “prefer to enable their employees to make their own arrangements". What they do to enable their employees to make their own arrangements is labelling a certain amount of the salary as being meant for pension arrangements.

It varies between the interviewed employees whether they actually prefer to make their own arrangements or prefer to have a pension scheme arranged by their employer. The most important reason for having a preference for their employer arranging it, is the automaticity: they save money for the future without having to think about it. Reason for preferring to make their own arrangements is a distrust in the official pension schemes and their future sustainability: for them it feels safer and easier to have the money on their own saving accounts.

None of the freelance workers in our study take part in an official pension scheme. Most of them have not (yet) made pension arrangements. Reasons being that their current earnings do not allow it or not having thought about it: they find it hard enough to figure out how to run their business and do not feel the mental space to look into pension arrangements at the moment. Others, however, have made arrangements. Generally, their approach is to save money. This has their preference, because it allows them to decide at any moment what they can do with the money: their pension scheme can therefore also be used when times are bad for their company.

> *If I don't do it for 30, 40 years, I have a big problem. However, I don't know how to arrange it, do I need to involve an external pension fund? I don't know how it works. I need to look into it. It is something I should do in the future. At the moment I feel it is hard enough to figure out which taxes I should pay, how that works and how I need to do my administration. I am doing better and better, but it is just a lot that you have to figure out by yourself.*
> **Games 4, freelance worker**

4.8.2. Earning money in the games industry: wages, fees and earnings

There is no collective agreement in the games industry or any other kind of reference point for the determination of wages. Wages are determined based upon individual bargaining between the employer and (future) employee. The portfolio and work experience of the employee are important determinants. The employees interviewed indicate that they do not often actively bargain about their salary with a future employer but just accept the offer, the reasons being that money is not their first motivation and that they feel lucky to be able to find a job in the industry. Also, they recognize that having the work experience is valuable for their career prospects in the industry. Moreover, the number of people willing to work in the industry and the choice this gives employers, weakens the bargaining position of employees: employers do not have to offer high salaries to attract good employees.

> *It is a demand-based market. If you want to hire someone, you don't have to offer a high salary to get someone. There are many more graduates than available jobs.*
> **Games 4, employer**

Nevertheless, there is quite some variety between positions in the games industry. Wages are higher -and bargaining is easier- for programmers in the industry, because their skills are also valuable in other sectors. This is reflected in a stronger bargaining position both for programmers working as employees and those working freelance.

> *Programmers can find work everywhere, whether it is game related or not. Programming is a valuable skill. They can get paid well. Artists that put at least the same amount of time and passion in their work, they are undervalued.*
> **Games 5, freelance worker**

The fees of freelance workers in the sector vary greatly, between 15 euros and about 50 euros an hour, also depending on whether they are programmer or not. Fees are also adjusted depending on the hiring company. When a company has little to spend, freelance workers tend to lower their fees.

Earnings are often lowest for starting entrepreneurs and indie game developers in the industry. They often pay themselves little (below the minimum wage) or no money to be able to invest as much as possible in their company. This period can last quite long, since it is difficult to earn money in the industry because of the strong competition and ineffective business models of small enterprises.

The market is easier for serious games, as they are often commissioned. This makes the earnings a lot more reliable. Therefore, the question of being able to distinguish your game from all other games on the market is far less central. Nevertheless, interviewees point out that it can be hard to find new customers, because the possibilities of using games as a tool is not yet very well known in other sectors.

4.8.3. Skill development

Most of the interviewees have an educational background at an official games school. Some of the entrepreneurs have a background in a different industry and transferred to the games industry because it appealed greatly to them. Most of the skills they learned after completing their formal education, whether creative or entrepreneurial, are acquired by doing. In addition, creative skills were learned by visiting events and conferences (especially conferences for developers – "devconfs" - are regarded to be important), by doing online courses and within online communities. Online communities play a central role in the industry and are informally organized. The acquiring of entrepreneurial skills is mostly by doing, supported by following courses. Courses mentioned are for example those organized by the local municipality and by the Dutch Game Garden.

> *The only thing that is quite important in the games industry is that you keep an eye on the online communities, become a member of Facebook groups that show each other work and draw your attention to events that are organized. These kind of things are really important. To have these connections.*
> **Games 5, freelance worker**

Maintaining your (creative) skills up to date is important because of the rapidly changing nature of the industry. Moreover, the industry is characterized by people that strive to perfection. Keeping your skills up to date and constantly challenging yourself to learn and do better is important in this context.

> *It is the process of doing it, and keep doing it. To think and to keep thinking. I have also thought myself how to program. I do a lot. And by doing I discover how it can be improved. It is nice. With a new project I work together with new people and they have new techniques. You learn these and this is how you progress.*
> **Games 5, freelance worker**

Recently graduated freelancers in the industry are hired by companies to add to the team in project based coalitions. Within these positions they are also able to learn from the project team and the hiring company and build experience within a series of projects.

> *What I hope that freelance workers learn is just what we also learn from our boss. It is just safe to swim beneath the fins of larger fish and to learn from them. The trick, how do you do it? How do you build a game within budget, within time with a certain team.*
> **Games 5, employer**

The interviewed employees in the sector state that they regard it their own responsibility to keep their skills up to date and not the responsibility of the employer to offer them possibilities. Nevertheless, they feel that their employers are supportive, for example by allowing them to take a day of to visit a conference.

> *I believe that as a developer I need to keep my own skills up to date, regardless of whether I am employed by a company or not. This is a rapidly growing industry. And not only in size, but also in scope. And within all dimensions it is expected that you keep your skills up to date.*
> **Games 4, employee 1**

Interesting is that in the skill development after graduation, official educational programs, from which many of the workers graduated, do not play a role. They do not offer courses to people apart from their own current student population.

4.8.4. Vulnerability?

Relatively low earnings for the prevailing skill levels, long working hours, insecure positions and a widespread lack of pensions and other social security elements seem to point to a high vulnerability in the games industry. However, whether workers perceive themselves as vulnerable in the games industry seems to depend on their position. Employees feel that their position is secure enough and that their wages are sufficient. Although one of them notes that it might be good to have more transparency about wages in the industry to give workers better insight in what is normal and what they can expect. They however recall feeling vulnerable upon graduation because they knew how difficult it is in the sector to find a position. Now they feel secure because they have succeeded. Nevertheless, one of them notes that the time pressure might be an issue, because of the silent expectation in the industry that developers work 50 to 60 hours a week.

The feeling of vulnerability is different for indie game developers. They note that they are basically able to do this because they have few responsibilities in their lives. They state that they know very few indie game developers that start a family because of feelings of vulnerability. For those workers, their vulnerable position is reason to postpone having a family. Freelancers have similar concerns, especially the less experienced ones.

4.9. Conclusions

Like the graphic design sector, also the games sector belongs to the unorganised part of the creative sector. It does not in any way follow the traditional Dutch pattern of interest representation. There are no employers' organisations, trade unions hardly play a role and there is no collective agreement to determine wages and working conditions. Again like in the graphic design sector, interest representation in the games sector is organised on a professional or occupational basis, with the DGA as the main actor and an important role for the DGG as well. They include all employment statuses in their target group and argue that the boundaries between these statuses are blurred: many combine being for example an employee with being a freelancer and many change their employment status repeatedly over time. However, contrary to the graphic design sector, the DGA and DGG mainly represent the sector towards (national and local) policy makers, towards other sectors, and internationally. They do not have any direct role in the determination of wages, fees or working conditions. It is the market that rules, which in practice means that clients and employers often one-sidedly set prices and wages. This leaves employees and freelancers in a weak position, with the possible exception of programmers, who have a strong bargaining position because their skills are scarce and are sought for in other sectors as well.

Again similar to the graphic design sector, also in games the persons working in the sector are highly intrinsically motivated and argue that working in the sector is their main goal and passion. This leads them to focus on being able to work creatively in the type of work they like instead of bargaining about wages and working conditions or organising collectively to do so. This is only strengthened by the fact that it is a young sector with young workers. Contrary to the graphic design sector, the share of freelancers is quite low and cannot be seen as an obstacle to organising collectively.

Although the people active in the games sector often do not consider themselves as precarious, this view may be influenced by the desire to work in the sector. Objectively, however, a number of vulnerabilities can be observed. Wages are not low but not high either, working hours can be sometimes very high, few have good pension plans and freelancers and small entrepreneurs often earn very little, especially in the early years of their careers. Also, it is a sector where it is simply very difficult to achieve stability and to earn good incomes, because of the strong competition, a high turnover of companies and the vulnerability to economic fluctuations. Even though this may subjectively be compensated for by intrinsic motivation, it is doubtful if this will work in the longer term. Indeed, there seems to be a consciousness emerging in the sector that there is a need to reduce uncertainty and increase social protection, to strengthen motivation and productivity and to deal with the increasing average age of people working in the sector. We observe that many initiatives in this direction are taken, ranging from offering more permanent jobs, to reducing crunching through better management, to setting up pension plans. So possibly, over time, a more mature gaming industry will also be less precarious.

5. CONCLUSIONS AND DISCUSSION

The creative sector is at the centre of attention of public policy in the Netherlands because of its perceived capacity to create jobs and to spur innovation, in the sector itself and beyond. To be able to dialogue with the sector, the government prompted it to establish representative bodies, a top down process in a sector where until recently no collective identity as creative industry existed. This identity has been developing slowly in recent years but remains fairly weak. The same counts for the representative organizations. They are now well established as interlocutor with the government but their ties with the people working in the sector remain frail.

This is different in the subsectors composing the creative sector, here collective identities are much firmer. Where interest representation is concerned, the situation in the various subsectors is however very diverse. Some sectors follow the traditional Dutch pattern of industrial relations in which trade unions and employers' organization negotiate sectoral (and in some cases company) collective agreements to regulate wages and working conditions. This is the case, for example, in the architectural sector or in the media. Collective agreements generally cover only employees and not freelancers, a group that is relatively large in the creative industry. However, for example the collective agreement for journalists working for publishers requires the publishers to develop policy on a series of aspects of their relationship with freelancers. Indirectly then it does regulate freelance work to some extent.

In the two subsectors discussed in detail in this report, interest representation departs strongly from the standard Dutch model. There are no employers' associations, trade unions hardly have any members and influence, and there are no collective agreements. Collective interest representation is organized along occupational lines rather than along the lines of capital and labour. It is based on a fluid notion of employment statuses and frequent changes therein among the persons working in the sector, who at some point may be freelancer to then become employee, and later on start their own enterprise. Also, frequently, one person is both freelancer and employee, or employer and freelancer at the same time. For the occupation-based interest representation this means that the intention is to equally and in the same way represents employees, freelancers and employers.

Interest representation in the two subsectors has three dimensions. One is the representation of the subsector and the occupation towards the external world. On the one hand, this is directed towards economic actors (clients, partners, investors, etc.), aiming to develop markets, opportunities for cooperation or opportunities to finance projects. On the other hand, this concerns lobbying and dialoguing with political actors (national and local politics and policy makers) with the aim of promoting public policy in support of the subsector. This may concern financial support, support for cooperation with knowledge institutions, education, incubators, etc.

The second dimension concerns the provision of services to members (and often non-members as well), including information on the sector or on tax regulations, courses on how to start and run an enterprise, network meeting, conferences, advisory services, etc. And the third dimension, more developed in the graphic design sector and hardly in the games sector, concerns the collective regulation of wages and working conditions. In particular, in the graphic design sector we refer to the guidelines produced by the main interest representation organization BNO, which are quite widely used. They constitute a form of soft regulation, i.e. standards that are not obligatory but that have a voluntarist nature, but they have a real impact on the sector. The fact that graphic design does engage in the collective (soft) regulation of wages and working condition and the games sector does not could possibly stem from the former sector being a much more established one and the latter a really young and still small sector. Also, some interviewees in the games sector did voice interest in such forms of collective regulation. However, there is no clear reason to suppose that the games sector will in time follow the graphics sector in this respect.

The voluntary working conditions guidelines by the BNO constitutes an effective means to regulate job quality in the graphic design industry as it is adopted by many organizations. However, its reach is still limited as the sector is characterized by a large group of self-employed workers. For them, it is the market that determines their income and hence the financial possibilities they have to organize, for example, social security for themselves. The same applies to all workers in the games industry in the absence of any collective regulatory instrument in this sub-sector. In practice this means that employers and clients often one-sidedly set wages and prices, which obviously results in relatively low standards. The exception are those with scarce skills that bringing a strong individual bargaining position to the table. From the graphic design example it can be concluded that occupational organizations can have a clear influence on job quality through collective regulation, even if it is in non-traditional ways. However, the challenge remains, just as in other parts of the economy, how to improve the job quality of those in other positions than employees, a question especially relevant for the creative industries where many workers fall outside the employee category.

In line with previous research, working conditions in the sector were not perceived as precarious by the workers. Problematic aspects of working in the creative jobs were rather considered as a consequence of the 'privilege' to be able to do this type of work (Umney and Krestos 2015). People saw plenty of opportunities to make a decent living. It can be questioned whether these perceptions are not set by their determination to want to work in the sector. In graphic design, there are many freelance workers - out of necessity as there are simply not enough jobs available- and they are in fierce competition with each other contributing to relatively low fees for especially those in the early years of their careers. From this situation it follows that many people in the sector have only limited social security provisions in terms of insurance against unemployment and disability or occupational pensions. Also in the games industry, objectively, wages and working conditions can be tight with for some, especially starting entrepreneurs, low to very low earnings. Moreover, few have pension plans and it can be hard to achieve long term stability –also for those within companies- because of the high turnover of companies due to strong competition and sensitivity to economic fluctuations. In the games industry however, there seems to be a growing awareness, especially among the more established and larger companies, that there is a need for a higher level of social protection and stability. In time, this could lead to reduced precariousness in the sector and a higher level of professionalization.

Altogether, the level of organization in the creative industries has been increasing over the last decade, fuelled among others by the top sector policy of the Dutch government. Corner stones are the occupational organizations of the sub-sectors and collaboration between them. These actors organize workers based on occupational identity rather than the capital-labour divide, tying employees, freelance workers and employers to their organization. In this way they form an answer to the complex realities of the creative industries in which workers change roles over their life course as well as combine several roles at the same time. Notwithstanding, they also have no real answer to how social protection of workers should be safeguarded in such a context. In the cases where they try to regulate working conditions, for example the voluntary guidelines of the BNO, the regulations are limited to employees, just as they are in the traditional model of collective agreements. In this sense, they do not (yet) manage to deal with the fact that employment statuses in the sector are rather fluid, and it remains a challenge to guarantee good job quality and in particular sufficient social security provisions across the sector.

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Appendix 1. Code tree

- developments
  - future developments
  - fluctuating market
    - (economic) crisis
  - digitalization, technology, globalization
- career perspectives
- evaluation top sector policy/government policies
- industry characteristics
  - hit driven
  - intrinsic motivation
  - informal/good atmosphere
  - applied versus entertainment games
    - different background workers
    - applied - top position world wide
  - demographics
    - many small enterprises
    - high company turnover
    - young people
    - many self-employed
  - strong pull factor/sexy
  - international character
  - own the whole chain
  - portfolio
  - self-realization important
  - charity projects/societal relevance
  - ahead of other sectors on all fronts
  - passion
  - autonomy valued
  - sector set up from above
  - competitive
    - strong competition for assignments
      - low earnings
  - diversity
  - crunching/long hours
    - good planning to counter act
  - earnings
    - difficulties outside representation
    - equal-/fair wages
    - not much needed
    - good wages

    - lower wages
    - no mind-set for earning money
    - difficult to sell/earn money
    - entrepreneurial skills
    - practice of free pitching
    - we agree to work for low fees beforehand
    - earning money less important
    - lousy business models
        - entrepreneurial skills needed for success
    - difficult to ask high fees
        - counter strategies
  - problem solving potential/innovation
  - motivated people
  - creativity centred
  - skills needed are changing
  - not professional
- context
  - Netherlands = leading position
  - regional spread
  - company locations
  - context of municipality
- description organizations: tasks and services
  - top team/sector/council etc
  - trade unions
  - professional organizations
    - legitimacy set up of the organization
- sector boundaries
  - creative sector?
- industry needs
  - flex for start ups
  - government social security
  - lifelong learning programs
  - better statistics
  - enlargement of the sector
  - assignment regulation
  - better regulation self-employment
  - minimum fees
  - coaching by successful entrepreneurs
  - bigger role prof org
  - more business skills in education
  - investment (fund), no subsidies
- vulnerability?

- position towards large clients
- no perceived vulnerability
- little social security
  - too expensive

skill development

- online
- responsibility
- formal education
- courses
- government programs not used
- no professional structure
- creative
  - learning by doing
    - learning through collaboration
  - events
  - network based
- entrepreneurial
  - coach
  - courses
  - learning by doing

wage determination

- bench mark
- fees
- freelance good wages
- BNO guidelines
- fluctuation/ volatility income
  - impact on work life balance
  - pay-for-cure
  - revenue-sharing
- height
  - big companies, good wages
  - indies, low wages
  - low income for owners
  - seniority and talent based
- wages enough for living
- individual bargaining
- good portfolio needed

social security

- HR
- welfare sufficient
- own network
- employment conditions

- illness and unemployment
    - as employer for employees
    - too expensive
- preference employer arranges it
- preference self-organization
- no wish to/did not think about it/difficult
- self-organization (by technology)
    - bread funds
- pensions
    - no money

forms of voice and representation

- perceived demands for representation
    - do not want to be organized
    - do(n't) know the organization/top sector
    - did not think about it
    - need for ca
    - no need for ca
- employers' organizations
- membership
- trade unions
    - self-employed
    - membership
- professional organization
    - helpful services
        - BNO guidelines
    - important to have a voice as a sector
    - needed from a government perspective

organization of work

- internships
- hiring employees
- project based coalitions
- use of temp contracts
- preference small organization
- multi-skilled teams/individuals
- collaboration/outsourcing
- networks
    - platforms
- use of freelance
- up- and downscaling

(shifting) employment forms

- dual strategy
- self-employed

        - preference
        - not a free choice
- employee
- partner/entrepreneur
- business models
    - own projects
        - indie
    - subsidies
    - work-for-hire
        - own clients
        - Sub-contracted