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Understanding, Capturing and Fostering the Societal Value of Culture



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Introduction

As part of Topic 3, this Deliverable 3.8 examines and reports on the issue of the influence of public administration evaluation methodologies on cultural production and heritage management. As the literature has addressed, evaluation methodologies and practices are **relative to each administration's cultural policy models**. Dominant regimes of worth and justification driving evaluation practices can therefore be broadly inscribed in liberal, central European and Nordic models of cultural policies (Chartrand & McCaughey, 1989; Zimmer & Toepler, 1996, 1999; Mangset et al., 2008). Moreover, these official evaluation processes and their legitimacy affect and are affected by core values and material cultural resources available within specific cultural fields (Dubois, 1999; Heinich, 2012).

Taking into account these elements, this deliverable seeks to analyze **the methodologies of evaluation** used by cultural administrations and to address the question of their **influence** over cultural actors and cultural institutions located in the fields of cultural production and heritage.

To understand the complex scenario where legal, administrative and performing frameworks and dynamics determine how influence is attempted and achieved, we address micro and macro levels of cultural policy within public policy governance, value recognition and stakeholders' interaction. As a result of our inductive analysis, two ideal types of public evaluation methodologies influencing cultural production and heritage have been elaborated. The first one corresponds to ***Bureaucratic-led evaluation aimed at cultural institutions/heritage monitoring***. This form of evaluation entails a top-down, long-term, standardized and spatially-framed assessment of cultural institutions under the control of the administration, focusing on their average performance. The second one is what we shall call ***Experts-led evaluation aimed at cultural resources/status allocation***. In this case, evaluation, even legally and administratively framed, is reactive to cultural and artistic projects, and it develops a more project-oriented, shorter term and informal perspective.¹

Our case selection is justified under these premises and includes two pairs of cases of bureaucratic-led and experts-led evaluation located in **Spain and Norway**. On the one hand, *Fàbriques de Creació* and *Matadorio* policy programs in the cities of Barcelona and Santiago, respectively, and the national Norwegian Museums' evaluation program correspond to a bureaucratic-led type of evaluation. On the other hand, our selection includes two cases of expert-led evaluation: the case of cultural grant policies in Santiago and Barcelona and the case of The Cultural Rucksack schools program managed in Norway at the national level, but also with regional and local administration intervention. Overall, these cases are framed by different state-driven models and traditions of cultural policies. Norway is homogeneously characterized by its communitarian and social welfare focus and arm's length strategies (Mangset et al., 2008). Spain, instead, corresponds to a quasi-federal country distinguished by its internal cultural diversity, in which historically different cultural policy traditions and models coexisted (Ariño, Bouzada and Rodríguez Morató, 2005; Bonet and Négrier, 2007). In spite of its internal diversity, the whole Spanish cultural policy system has gravitated toward the central European model, nuanced by the specifics of the Mediterranean adoption of this model, where corporate and clientele dynamics might be more present (Ulldemolins and Arostegui, 2013). Following this general

¹It should be noted that, in line with Weber's definition, we understand the concept of ideal type as a form of 'guidance for the construction of hypotheses' (Weber 1949, 90). This notion is used to frame the boundaries between the two forms of evaluation, but the actual practice of evaluation in some of our cases might entail overlaps and combined competencies. E.g. in the TCR case, both bureaucratic and aesthetic competencies might be at play. This is also visible in the role of careers of the bureaucrats in the Norwegian cases.

framework, cases are methodologically aligned to specific contextual conditions defining their examination units as well as tools for tackling their policies and practices.²

² For instance, in the case of Spanish *Fàbriques de Creació* reaching an understanding of this policy as a program led to the selection of four subunits or Factories, which represent the policy as a whole.

First pair - Direct influence

1. Urban cultural policies in Spain (Case 3.1)

The influence of (e)valuation practices and methodologies in urban policies is analyzed by studying two Spanish cultural policies, *Fàbriques de Creació* in Barcelona and *Matadoiro* in Santiago de Compostela.

1.1 Cases background

Fàbriques de Creació Program

The Program *Fàbriques de Creació* (Factories of Creation), deployed by Barcelona city cultural administration since 2007, **consists of 11 old and renovated industrial buildings** located in 6 different neighborhoods to provide services and facilities for art and design creation and circulation. Each Factory focuses on a specific artistic field (from cirque to dramaturgy). All buildings are publicly owned and most of them are managed by non-lucrative private sector actors (i.e., Foundations, Associations), except for *Fabra i Coats* which is administered by the cultural administration agency (Institute of Culture of Barcelona-ICUB). The program model allows each center to operate with significant autonomy (Talarn et al., 2019).

Barcelona's **cultural-led urban regeneration policies** used industrial hubs and buildings as a core material and symbolic resource of the Olympic city reform. Following similar urban interventions, such *Friche la Belle de Mai* in Marseille or the Cable Factory in Helsinki (Paül i Agustí, 2014), the *Fàbriques de Creació* program exploits cultural projects developed in these industrial buildings to boost them under the same umbrella.

Since 2015, with the arrival of the local government of the left-wing coalition *Barcelona en Comú*, the program has slightly changed its orientation towards **strengthening community intervention** and other social goals. In this way, some facilities connected with historical revindications of a part of local grassroots and cultural associations. The coalition cultural policy seeks to reinforce articulations between creation and culture and educational and socio-territorial needs. In this line, the cultural policy narrative was reframed in the discourse of cultural rights and the commons (Ajuntament de Barcelona, 2016).

Matadoiro Compostela

Matadoiro Compostela (from now on, "Matadoiro") was a **cultural center experiment** launched in 2016 in the city of Santiago de Compostela by the Left-wing Compostela Aberta government (2015-2019). The project's name mixed the title of one of the essential experiences of urban regeneration in Spain, Matadero Madrid, with the square where the building is still located. The building used was built in 1984 over the old city central slaughterhouse from the XVII century. The centre location corresponds to the UNESCO World Heritage Santiago's Way door and historical city centre, Porta do Camiño ("Way's Door" cross doors).

After a few years of grassroots organizations' management, the public space was further integrated into the extensive socio-cultural centres city network (CSC) of 42 infrastructures, with the PSOE centre-left government raised in 2019. However, the project was shut down in 2020 due to Covid19 and is still closed due to refurbishment needs.

Matadoiro hosted **several cultural activities** and five workgroups, as part of a pilot process seeking to foster citizens' self-management of cultural activities. The Council only covered expenses concerning wi-fi, electricity and water supply and all the equipment resulted from private donations. Different agents (i.e., including opposition parties and newspapers) from the city demanded its demolition after and before the *Matadoiro Compostela* process too. The space was politically controversial and interfered with by local press media intensely. Nowadays, the city government from PSOE is still developing refurbishments to (re)include the space in the CSC network.

1.2 Methodology

The methodology followed a qualitative and inductive approach. Fieldwork (02-2022/05-2022) was aimed at collecting data from key stakeholders regarding **values recognition, promotion and legitimation** examined within local cultural policy and its **evaluation methodologies**. Guided by these three analytical dimensions, the process of establishing the sample has included an exploratory phase that consisted of a documentary review of secondary sources (such as local cultural administration documents) and preliminary contacts with experts and local cultural administration managers and technicians in order to identify potential key informants. Later, we implemented purposive non-probability sampling through a snowball technique and following relevant criteria. Data collection process has combined 10 in-depth interviews and 2 focus groups. According to preliminary exploration, four categories of actors and informants were defined as follows:

Category	Barcelona interviews (Nr.)	Santiago interviews (Nr.)	Barcelona focus group (Nr.)	Santiago focus group (Nr.)
1. Local cultural Administration (program managers, etc.)- including opposition members	2	1	1	1
2. Fàbriques/Matadoiro management (directors, boards, etc.)	4	2	2	1
3. Creators/ artists /users within each space			1	1
4. Proximity/Community actors		1	3	1
Total	6	4	7	4

Table 1 - List of informants categories and number

Within 11 Creation Factories facilities, we have selected the following **4 subunits of analysis**, based on their management model, cultural sectors and their respective urban regeneration models and embeddedness in the territory.

Case and inception date	Management model	Sector	Space and urban regeneration model
Ateneu Popular 9 barris (2008-)	Public-associative co-management between the City Council and the grassroots organization “ <i>Associació Bidó de Nou Barris</i> ”	Cirque	Not in a creative district. Old asphalt factory, converted into a creative and cultural center in 1977, as a result of the neighborhood movement’s struggles (Nou Barris).
Hangar (2008-)	Public-associative co-management between the City Council and the Foundation “ <i>Fundacio Privada AAVC Corporate</i> ”	Transversal/ experimental	Creative urban district - 22@- Artistic production and research center founded in 1997, located within a former nineteenth century industrial complex (Sant Martí)
Sala Beckett (2014-)	Public-associative co-management between the City Council and the Foundation “ <i>Fundación Sala Beckett</i> ”, Obrador Internacional de Dramaturgia – Patronage with 12 experts	Dramaturgic	Creative urban district 22@- New space in a former nineteenth century old worker’s Consumer Cooperative (Sant Martí)
Fabra i Coats (2008-)	Public Management – Lead it by ICUB Agency/MACBA and a curators board	Contemporary visual arts	Not in a creative district. Located in a former nineteenth century textile factory (Sant Andreu).

Table 1. *Fàbriques de Creació* sample

The first fieldwork phase aimed to understand institutional configurations, valuation practices and central tensions among actors. **Semi-structured interviews** with crucial responsible for urban regeneration programs and managers/users from each art facility were conducted. The analysis of policy action addressed relationships and dynamics between the City Council and the art facilities management and internal dynamics. The methodological strategy is completed by implementing **focus groups** with selected stakeholders, where micro and spatial aspects were further considered. By presenting different views and scenarios, focus groups were used to debate, triangulate and clarify specific elements from interviews in the second fieldwork stage (Kitzinger, 1994).

Data analysis strategy

Two methods are applied to scrutinize the data. First, **thematic content** analysis was used to identify and examine relevant practices in interviews, focus groups and relevant documents (grant design reports, programs, etc.). Data coding was employed for content analysis in two stages, including preliminary coding and secondary classification, to extract critical elements, which will also be used to compare results from different focus groups (Charmaz, 2006). Finally, discourse analysis examined specific narratives and policy frames from interviews and focus groups after the codification process.

Code	Affiliation	Field	Activity	Sector
P1	City Council	Local Cultural Administration	Program Manager	Public Sector
M1	Managing Organization	Visual arts	Artistic manager	Third Sector
M2	Managing Organization	Performance arts (theater, dramaturgy)	Artistic director	Third Sector
M3	Managing Organization	Performance arts (theater, dance, music)	Coordinator	Third Sector
M4	Managing Organization	Performance arts (music, dance)	Coordinator	Public Sector

Table 2. Interviews codes (Barcelona)

Code	Affiliation	Field	Activity	Sector
P2	City Council	Local Cultural Administration	Project officer	Public Sector
M5	Managing Assembly	Multidisciplinary	Coordinator	Third Sector
M6	Managing Organization	Multidisciplinary	Member	Third Sector
C1	Community member	Multidisciplinary	Participant	Third Sector

Table 3. Interviews codes (Santiago)

1.3 Findings

The main findings point out that evaluation approaches and methodologies in the case of urban cultural policies in Spain influence several domains of urban cultural policies that involve institutional practices as well as the ways to do and the practices of creators and other cultural and artistic actors. The **incidence of evaluation methodologies** in shaping cultural policies takes form through formal and informal practices and mechanisms.

Regarding the cases analyzed in this first section, we have found that under similar contextual social and political conditions, including social value-focused and pro-bottom-up governance local administrations, all organizations' evaluation methodologies present some common elements. Firstly, broad -or non-existing-(in the case of *Matadoiro*) evaluation criteria and methods allow **flexibility** in the internal administration of urban spaces. At the same time, this flexible evaluative framework entails **adaptable qualitative justification** frameworks driving policy influence. Secondly, such a high-level evaluation criteria framework, although not attached to strict standard requirements, reveals **persuasive capacity** in terms of its power to shape entities' internal policies and practices. In this regard, participation (discussions and protocols surrounding evaluation) may act as a tension-creating and solving strategy promoting commitments and awareness of guiding values, as well as policy and political issues. The pivotal character and mediation tasks of spaces' managers, therefore, becomes central in this process. Thirdly, this relative influence of evaluation methodologies impacts urban facilities' users and community actors and works as urban stabilizing mechanisms through establishing policy grounds, often integrating these actors' interests and assuming social collectives' specifics (i.e. community participation in *Fàbriques* internal evaluation tools or community projects selected for granting within a Factory).

1.4 Influence of public administration evaluation methodologies

Configuration of actors and organizations

The *Fàctories* policy program and *Matadoiro Compostela* evaluation methodologies entail four main categories of actors. Firstly, the **City Council cultural administration** (ICUB or Santiago CC) supports, coordinates and monitors facilities and directly administers one of them (Fabra i Coats). Under this category, several public officials and civil servants in charge of urban cultural policy programs can be identified.

Secondly, we identified **Third Sector organizations** (Civil Society Associations, Foundations, etc.) taking part in the management model, including spaces' coordination (in publicly-owned facilities provided by the ICUB). Different internal boards and direction committees and assemblies are in place in this framework. In the case of Factories of Creation, the predominant management model, which we refer to as public-associative (see the table above), consists of a partnership between the local administration and civil society associations. In the framework of the Factories of Creation program, co-management is implemented as a form of outsourcing of activities and services that goes beyond the simple delegation of tasks, since grassroots organizations take part in the definition of substantive actions, strategies and inputs in order to deploy the program. Facilities' Managers coordinate activities and services and, in many cases, are in charge of reporting on performance to the administration. Therefore, some of these managers play a vital role in the evaluation process. Even though it is the City Council the main actor in leading and evaluating services and activities, public-private articulations and capacity to decide depends on the particular governance relations in each of the facilities.

Although administrative, legal and political supervision is in charge of public administrations, we have observed a certain balance of power between the above two types of actors concerning evaluation methodologies. This is particularly evident in the *Matadoiro* case, where self-management ("governing without government") is at the root of the political project.

Thirdly, we can find different typologies of users and "owners" of the spaces, including **resident artists or producers**. In *Matadoiro*, this category also includes artisans and informal cultural activists. Finally, other individuals taking part in these facilities or entailing different types of interaction with them are **surrounding communities** and entities, whose participation ranges from formal to informal involvement in the definition and implementation of evaluation processes. For instance, some actors from Factories committees, integrated also by neighbors, collaborate in the discussion of criteria to be agreed on with ICUB. Still, overall, communities' bottom up capabilities in the evaluation instruments design is very limited.

Formality, rational elaboration, publicity and salience

Barcelona and Santiago urban cultural policies reveal a **medium-high level of informality** in their evaluation methodologies, respectively. In the Factories program, each facility's performance evaluation is conducted by the ICUB as part of a reporting process for which standards and methods are often blurred.

In principle, the factories currently work with some quantitative indicators were established 5, 6 years ago (since 2017) in a consensual process participated by all the directors/technicians who Factories had at that time. It was jointly with the technical office of the ICUB, which is the one that carries all the observatories of data. Therefore, a series of quantitative indicators in five areas were set. Support for creation, another part associated with invested resources, another part related to training and activities linked to both education and community, and another part that has more to do with exhibition. (P1)

Collaborative attempts to further systematize evaluation criteria and translate them into full coverage qualitative and quantitative indicators³ have been carried out. However, according to informants, their

³ Dimensions grouping possible qualitative indicators are: a) Organization / Governance, b) Rooted in the territory/Relationship with the territory, c) Rooted in the sector/ Relationship with the sector, d)

implementation failed because of divergences in qualitative criteria capacity to grasp each Factory's specifics⁴(Colombo and Font, 2020). So currently, following the above quantitative policy established in 2017, the evaluation methodology consists of reports (*Memòries*) completed by each Factory, mostly describing results from annual activities -such as budget structure, the number of audiences or resident artists- and irregular network calls between spaces and the administration responsible. Moreover, the administration provides no systematic feedback for memories to facilities managers. However, negotiations are being conducted to set qualitative indicators for overall performance analysis beyond that undertaken to justify grants received by Factories. Also, a project for establishing working groups integrated by facilities and administration is being developed.

It should be noted that the difficulty in establishing agreements and systematizing evaluation criteria is articulated by the administration's lack of material and human resources, the equipment itself and the precariousness of the creative workers involved in each case. These conditions limit the participation of the diversity of actors involved in these processes, configuring an unequal scenario that tends to marginalize the voice of the most precarious creators from the debates and decisions on evaluation. In this context, evaluation criteria are often defined and applied following a short-sighted "trial and error" logic that does not end up stabilizing as a formal and valid system for the case of creative factories (Focus Group). Instead, in *Matadoiro*, no official policy was established in this regard before 2019. Only informal communication between representatives from the space assembly and the administration concerning self-organized activities was requested by and provided to the administration.

Context and time

Evaluation follows the above process and is "performed" in irregular and online network calls and often directly between ICUB technical officers and the manager of the corresponding Factory. The administration gathers annual information from each Factory based on these calls and the memories mentioned earlier⁵. However, such analysis is not currently translated into any specific coercive or co-awareness evaluative mechanism leading to any particular action. In *Matadoiro*, the such methodology was more irregular and assembly style and did not reach the construction of a knowledge repository of performance as in Factories.

Value stabilization

The primary stabilizer of the evaluation methodology is its **limited binding and coercive character** regarding the internal management of each Factory and the *Matadoiro* space. This can be illustrated by the flexible approach of Factory managers to the evaluation process and its consequences as follows:

If the Public Administration understands and buys, in quotation marks, the concept, the philosophy and the objectives of the space, it is straightforward to evaluate. I insist that it is also very important to guarantee a democratic internal functioning, to audit, obviously. Our space has audits everywhere. (M2)

We enjoy absolute independence in terms of programs. We do try to work together with the Administration on some things, which can affect our programming, and in some way, if the ICUB suggests we do something if we can, we obviously do it. (M1)

Social return, e) Internal democracy and participation, f) People, processes and environment (Colombo and Font, 2020).

⁴ It should also be noted that most Factories also deployed additional internal methodological mechanisms including both qualitative and quantitative assessments of their activities.

⁵ Also, on the justification of annual grants received by most of these spaces to reflect upon their performance internally at the ICUB level.

Secondly, the centrality of **social and participatory values** in studied cultural policy favors a broad and smooth "aggregation of demands". In this regard, actors' demands often integrate several principles and material components adapted to ICUB social policy either directly or indirectly. For instance, the impact of social activities, gender balance or community participation on each facility's cultural sector's economic development (i.e. cirque or theatre) or the international projection of these facilities' artists due to public support.

However, it should be noted that social value focus in public evaluation analysis, approached from the rationale of self-management in *Matadoiro*, encountered more obstacles as a stabilizer due to additional "systemic constraints" (i.e. legal framework, political dispute, etc.).

1.5 Tensions and their dynamics

Characteristics and evolution of tensions

Two main types of tensions have been identified in the cases of **Factories**:

- Firstly, a value tension between **social value (proximity task of facilities) vs aesthetic values** often framed artistic elitism. This also mirrors the tension between **homogeneity and heterogeneity** among the different aesthetic and artistic repertoires managed by each Factory (these range from popular arts to Catalan dramaturgy). The complex articulation of these two orientations is a source of tension that affects the governance of the facilities, programming, and relations with the territory and creators, and also represents a polarity that correlates with a bureaucratic and a communitarian dynamic (Zarlenga et al., 2016). Still, as mentioned by one City Council public official in charge of the program, we can identify a certain process of convergence among Factories:

It is a program that has evolved a lot because it came from projects that already existed. And that it was a bit like "artificial". It was decided to unite them in a single program. And each one came from different things. Then, this attempt not to unify but to say that we all have things in common, has caused each of the projects to be modified. Keeping its essence, but yes, for example, projects that were only aimed at professional parties, that did not have a community or educational links, little by little, by being part of this program, they have been developing these types of projects. Because they have been linked to cultural and educational projects, to community processes. Then there was a bit of this transfer of projects from one to another. And even projects that might seem to us to be more elitist have ended up doing good educational projects, going to schools, doing this kind of... (P1)

This tension is slightly strong, explicit and inscribed in the overall governance tension between program standardization and diversity of spaces orientations, disciplines, etc. In this regard, it also represents a more veiled dispute for unequal distribution of ICUB public resources assigned to each Factory.

- Secondly, a tension between **qualitative and quantitative-driven valuation practices**. Qualitative and quantitative indicators have been established for reporting on the performance of *Fàbriques*. However, this process has led to a dispute between the procedural and outcomes-based reporting approaches. Moreover, these orientations configure specific ways of measuring (indicators) the performance of factories that influence creators' work at different moments of the creative process. An example of this is how quantitative indicators assessing the role of the factories and resident artists' projects in community dynamization have encouraged projects in this line of work (M2, 3 and 4). This tension is slightly strong and explicit and presents limitations in terms of ICUB-led participatory instruments deployed to

address it (i.e. research project to develop new indicators in 2019-2020, which were not implemented).

Some differential aspects concerning the type of tensions identified in *Matadoiro* allow us to comparatively frame how central value configuration in evaluation methodologies and its governance can be associated with concrete tensions.

- Firstly, we have identified a tension between **bottom-up citizen participation** (including diversity and intersectional aspects concerning gender, ethnic character, etc.) and **accountability** at the value level. This concerns the fact of using a public building autonomously from local administration procedures and evaluation methodologies. The centrality of the participation value is associated with the autonomy of the space and organically fits the self-management criteria defined by the new left-wing administration in 2015. However, this understanding of social participation led to an intense dispute, which was explicit and inscribed in the overall political tension between the new government and the legal-political framework.
- Secondly, the above value tension is embodied by specific actors. This represents a dispute between a group of **self-organized citizens** -acting together with the new city government in 2015- vs **far-right opposition**, local press newspapers and some neighbourhood stakeholders (owners of other buildings). The dispute revolved around the uses and conservation of the building and urban aspects such as real estate interests and political stakeholders within the City Council (i.e. seeking the demolition and installing a new park). This tension was strong and explicit and included conflictual positions within the *Matadoiro* assembly, the city council parliament and the media ecosystem.
- Lastly, regarding **valuation practices**, the above-referred lack of standard and official procedures for reporting performance outside of the self-management ecosystem of users and their committees raised concerns. This entailed the absence of procedures beyond informal practices advanced by the volunteers' assembly and the executive committee. These limited valuation tools and their poor development were amplified by local newspapers and opposition due to the lack of predefined criteria assigning spaces, uses and ways of using the assembly and committee. Still, this tension was weak and implicit in the context of the above broader political dispute.

Structure of tensions

The central value tension in the *Fàbriques de Creació* program is associated with the conflicts between each space's artistic and managerial autonomy and the attempt to assess and guide them as a network on common grounds. While some organically fit social value criteria defined since 2015, others present difficulties in responding to specific proximity or gender outcomes. Instead, the qualitative/quantitative tension is embodied, in particular, by certain *Fàbriques* managers and actors demanding to consider the lack of suitability of quantitative indicators to report on processes (i.e. audience of an experimental art event) or as actual evidence of performance. Factories' management teams point out that quantitative indicators are insufficient to evaluate their activity. This requires reducing evaluation to a technical-bureaucratic approach, which excludes the perspective of creation as a process characterized by particular strategies, practices and forms of valuation:

"It is easier to objectify indicators of order, of structural functioning, of budgetary, organizational mechanics, than not, those that have to do with artistic quality" (M5).

The lack of qualitative consideration may widen the valuative gap between those factories that prioritize the aesthetic value (mainly Sala Beckett, to a certain extent Hangar) over the social value of culture (Ateneu Nou Barris, Fabra i Coats).

While in the Factories program, the structure of tensions is articulated around the bureaucratic pole - concerning the gap between social provision by urban spaces and artistic autonomy in both programming and qualitative reporting-, Matadoiro's core tension revolves around the communitarian pole. This meant the lack of official and systematic evaluation as one of the accountability instruments enabling the entity's legitimacy towards third actors.

Tensions mitigation and resolution

In the Factories case, first, the ICUB addressed the core value tension between social and artistic values and mirrored it by heterogenization and homogenization in the program governance through flexible evaluation categories. Secondly, poor coercive competence derived from performance analysis, recognition of the qualitative evaluation gap by the ICUB and ongoing attempts to produce qualitative indicators adapted to each space. Similarly, informal consideration of qualitative elements or specifics in assessing each Factory's performance has been applied. Network calls and ongoing dialogue between ICUB and Factories managers represent a stabilizing tool in this process. These calls focus on the Factories presentation and reporting of their ongoing activity, issues when deploying them and future projects.

In *Matadoiro*, tensions between self-managed participation and accountability were progressively mitigated. First, through the intervention of a mediator. Later, with the arrival of the PSOE centre-left government in 2019 and its vertical intervention in the space seeking its institutionalization. However, the other tensions were not totally solved but were controlled by the administration until the COVID closing in 2020.

2. Monitoring Norwegian Museums (Case 3.2)

2.1 Case background

This case investigates an evaluation tool developed and implemented by Arts Council Norway (ACN), an **annual evaluation of all Norwegian state-subsidized museums**. It is an administrative attempt to capture the different forms of cultural value that might be attributed to heritage management. Furthermore, the evaluation methodology uses a combination of numbers and qualitative judgment to measure the levels and developments of different values. This evaluation process highlights the intersection between administration and bureaucracy on the one side and heritage management and professionalism on the other.

The main part of the Norwegian museums' sector is constituted of around 60 museums, all belonging to a national network of museums receiving state funding. The majority of the museums are organized as not-for-profit foundations. Most of these museums have been the subject of a large-scale museum reform instigated by the Ministry of Culture in 2000 to create larger and better museum institutions. This museum reform entailed a massive reorganization of the Norwegian museum sector, i.e. through a massive reduction in the number of museum institutions. From being constituted by more than three hundred and fifty individual museum institutions, the national museum network today consists of around sixty administrative units. This reduction has come about through various forms of mergers, referred to as *consolidations*.

Current policy understanding of the museums' societal roles and responsibilities, should be read against the museum reform as a background. The museum reform, which was roughly implemented between 2001 and 2010, was built on the explicit ambition that all state-funded museums should operate and be relevant at three different levels: they should have local roots, be part of a regionally consolidated museum structure and be part of a national institutional network. As this case study illustrates, this ambition was also a source of potential value tensions within the Norwegian museum sector (cf. Løkka and Hylland, 2022). The basic ambition of the reform was to raise the quality and professionalism of the publicly subsidized museums. Accordingly, the evaluation reports covered in this case were introduced as administrative attempts to keep track of the development of museum quality and professionalism.

The administrative body in charge of museum subsidies and reporting is Arts Council Norway (ACN). ACN has developed an evaluation tool and process whereby they annually evaluate all institutions in the national museum network. This is how they describe the evaluation tool in the 2021 report⁶:

Annually, the Arts Council assesses the museums' achievement of goals in relation to guidelines of grant letters, general guidelines of administrative documents and the museums' own goals for the assessed year. The evaluation is based on expectations towards a professionally run museum. The assessments are made on the basis of the museums' statistical reporting for 2020 and budget applications for 2022, in addition to statistical compilations and time series revealing trends and developments over time. (*Arts Council Norway 2021*, p. 4).

The evaluations are based on a series of **quantitative and qualitative indicators**: outreach/communication, including visitor figures, strategic documents and audience development; collection management, including documentation and conservation, and research, which includes publication figures and levels of competence. ACN describes the evaluation as a way of **measuring the achievement of goals for these institutions**, based on "*expectations towards a professionally run museum*". This annual evaluation of Norwegian museums is by all accounts an administrative attempt to capture the different forms of cultural value that might be attributed to heritage management.

⁶ All quotes in this text are translated from Norwegian to English by the authors.

Furthermore, the evaluation methodology uses a combination of numbers and qualitative judgment to measure the levels and developments of different values.

Museum work is characterized by a complex set of goals and the values attached to these, as museums are expected to be audience institutions, research institutions, heritage institutions, identity institutions, tourist institutions etc. We will investigate the interplay between how these values are experienced by heritage and museum professionals on the one side and measured by public administration on the other side. We ask the following questions: What values of heritage and museum work are evaluated in what way by public administration? How does this kind of evaluation look from the side of the museum professionals being evaluated: how do the reporting and evaluation procedures influence the work and priorities of the museums? And how have the relevant categories developed between 2015 (the year of the first public report) and 2020?

2.2 Methodology

The main empirical material of this case consists of the annual ACN museum reports from 2015 to 2020. As 2015 was the first year of the new evaluation procedure, this gives us the opportunity to follow the development from the very start. The evaluation categories and indicators between 2015 and 2020 have been compared to identify changes and development in the implementation of the evaluation routine.

In addition to the material collected through the evaluation reports from ACN, we have conducted an interview with the administrative executive at ACN in charge of the annual evaluation. As the annual evaluation report was under preparation, this gave us the opportunity to discuss the topic in relation to recent evaluation work from ACN. The topic for the interview with the executive of ACN was the choice of indicators, the development and implementation of the indicators; the relation between museum policy and performance measurement, potential future change in museum evaluations etc. A central topic was also the relation between the different acknowledged values of museum work (knowledge, experience, identity, entertainment, diversity, relevance etc.) and the **attempts to measure these values**. We wanted to see if the administrators of systematic evaluations like these identify challenges and tensions in the work they do.

We have also conducted three interviews with museum leaders, all with extensive experience from the Norwegian museum sector. The main topic for these interviews was how the representatives from the museum institutions experienced the valuations from their perspective. Did they, e.g., see any tensions between the values they attribute to their own work as museum professionals and the attempt to evaluate this work by their funders? Did they see this kind of assessment and evaluation as a necessary (or unnecessary) evil, or did they use mandatory reporting as a tool to develop their work? In addition to this source of information on the museums' experience of evaluation, we have also benefitted from additional secondary sources. In a recent report on museums' societal roles, we surveyed all state-funded museums on how they judged the importance and value of different aspects of their labour. The results from this survey constitute highly relevant background information on how the museum sector sees its role as heritage institutions.

Category	Interviews (Nr.)
A. Administration agents, such as ACN	1
B. Museums management (directors, boards)	3
Total	4

Table 1. Fieldwork activities

2.3 Findings

The following illustration shows how an individual museum is evaluated and described in quantitative terms in the evaluation reports:

Stiftelse	
Samlede driftsinntekter	82 414
- totale egeninntekter	12 407
- ordinært driftstilskudd Kulturdepartementet	30 630
- ordinært regionalt driftstilskudd	31 359
- annet ordinært, offentlig driftstilskudd	0
- andre tilskudd Kulturdepartementet (KUD)	3 926
- andre regionale tilskudd	3 439
- andre offentlige tilskudd	653
Fordeling ordinært driftstilskudd KUD og region	
Kulturdepartementet	49 %
Fylkeskommune og kommune	51 %
Samlede driftsutgifter	82 228
Årsresultat	166
- i prosent av driftsinntekter	0,2 %
Egenkapital	52 279
- i prosent av driftsinntekter	63,4 %
Driftskostnad pr besøk i kr	885
Driftskostnad pr besøk for alle KUD-museene kr	1.130
Lønnede årsverk	58
Frivillige årsverk	3
Antall fast ansatte	56
Publikasjoner totalt	64
- med fagfellevurderinger	4
Åpne møter	98
Konsserter	-
Utstillinger	20
- nye siste år	6
Kulturhistoriske bygninger åpne for publikum	30
- åpnet siste år	-

Figure 1: Categories for quantitative evaluation of museums in annual report from Arts Council Norway. Source: Museene i 2020 (Arts Council Norway 2021).

Samlinger	
Kulturhistoriske bygninger	76
- tilvekst siste år	-
- tilfredsstillende registrert	76
Kunsthistoriske gjenstander	5 249
- tilvekst siste år	17
- tilfredsstillende registrert	5 249
- digitalisert	4 586
- publisert	22
Kulturhistoriske gjenstander	110 630
- tilvekst siste år	82
- tilfredsstillende registrert	44 709
- digitalisert	17 623
- publisert	9 988
Fotografier	1.586.664
- tilvekst siste år	601 673
- tilfredsstillende registrert	74 337
- digitalisert	29 017
- publisert	23 289
Andre samlinger	
Arkeologiske gjenstander	314
Naturhistoriske gjenstander	1 047
Teknisk-industrielle anlegg	-
Kulturlandskap (dekar)	-
Hageanlegg (dekar)	-
Levende samlinger (ja/nei)	Ja
Oppbevaringsforhold	
<i>Gjenstander (alle typer)</i>	
- svært gode	11 %
- tilfredsstillende forhold	71 %
- ikke tilfredsstillende forhold	19 %
- dårlige forhold	0 %
<i>Fotografier</i>	
- svært gode	60 %
- tilfredsstillende forhold	15 %
- ikke tilfredsstillende forhold	20 %
- dårlige forhold	5 %

Figure 2. Categories for quantitative evaluation of museums in annual report from Arts Council Norway. Source: *Museene i 2020* (Arts Council Norway 2021).

In the left column, there is information on different sources of income, different kinds of public subsidies, costs and expenses and man-years, including voluntary work. In addition, there are also numbers on publications (specifying the numbers on peer-reviewed ones) and on public meetings. In the right column, there is information on the size and the growth of different kinds of collections, as well as on storage conditions for the collections.

In addition to the above, all museums get a **qualitative assessment** of their performance on Dissemination/Communication, Collection Management, Conservation and Research. This assessment might contain statements of the following kind, related to a specific museum in the 2020 evaluation report:

Based on available information in statistics and in the grant application, the research work of the museum in 2019 is judged to be *less satisfactory*. To strengthen their work on research, the Arts Council recommends that the museum establish a research plan and get involved in collaboration with other research actors. (*Arts Council Norway 2020, p. 21, our emphasis*).

The initial comparison of the main indicators and sub-indicators of the six different national reports on the national museums' performance clearly shows signs of certain changes between 2015 and 2020. In 2015, the main indicators for the evaluation were *Collection management, Research and networks, Outreach, Other assessments* and *Overall assessment*. The names and the number of main

categories for evaluation have been changed several times, but three core categories are kept: Outreach, Research and Collection Management. These correspond to what in Norwegian often is referred to as “The Three F-s” of museum work: *Formidling, Forskning, Forvaltning*). These three categories alone speak to the fact that there is a potential tension inherent in the responsibilities of all modern museums: being responsible for technical conservation, audience development and scientific publications.

Another possible tension that is evident, is between **general and specific evaluation**. We see that there is a changing emphasis throughout the six years of evaluation, as to whether museums should be compared to a national average, to an expected minimum or to themselves and their own institutional goals. One example of this is the change from measuring visits as an absolute number to measuring the **development of visits**. In other words, there is a change towards comparing the institution with itself on this specific indicator.

Thirdly, there are also some shifts to be noted on the different emphasis on quantitative and/or qualitative indicators. The Arts Council seems to acknowledge after a couple of years, that there is a certain limit to what you might be able to measure with the use of numbers and statistics. This is a clear indication of shifting dynamics between quantitative and qualitative value.

The following table summarizes the main indicators and sub-indicators of the evaluation reports, as they have developed from 2015 to 2020.

Year	Main indicators and sub-indicators				
2015	Collection management	Research and networks	Outreach	Other assessments	Overall assessment
	Conservation and storage	Competence, projects, publications	Exhibitions	Intangible culture	Specific tasks for 2015
	Security	Network participation	Reflection, profile, target audience	Cultural diversity	
	Documentation		Digital presence	Organization, strategies	
	Collection development		Visits		
	Conservation of buildings		Other outreach		
2016	Collection management	Research and networks	Outreach	Other assessments	
	Conservation and storage	Competence, projects, publications	Exhibitions	Intangible culture	
	Security	Network participation	Reflection, profile, target audience	Organization, strategies	
	Documentation		Digital presence		
	Collection development		Visits		
	Conservation of buildings		Other outreach		
2017	Collection management	Research	Outreach	Other assessments	

	Collection development	Competence	Exhibitions and audience activities	Strategy, administration, economy	
	Storage	Projects	Reflection, profile, target audience	Networking	
	Conservation	Publications	Visits	Intangible culture	
	Security	Research Plan	Digital presence	Cultural diversity	
	Documentation	General description			
	Conservation and maintenance of buildings				
	Management of landscape, parks, facilities etc.				
2018	Collection management	Research	Outreach	Other assessments	
	Plans	Plans	Plans	Strategy, administration and economy	
	Documentation	Competence	Exhibitions and audience activities	Networking	
	Storage	Projects and R/D-collaborations	Reflections on profile and target groups	Intangible culture	
	Conservation and maintenance of buildings	Publications	Development of visits	Diversity and inclusion	
	Security	Prioritization			
	Collection development				
2019	Outreach	Collection management	Research	Organization and economy	
	Plans	Plans	Plans	Organization	
	Exhibitions and audience activities	Collection development	Competence	Salaries	
	Development of visits	Documentation	Publications	Self-generated income	
	Target group work and societal profile	Storage	R/D-collaborations and network projects	Equity	

			Reporting on goals	Liquidity	
2020	Outreach	Collection management	Research		
	Plans	Collection development	Plans		
	Audience activities and outreach	Documentation	Research competence		
	Development of visits	Storage	Publications		
	Target group work and role as societal actor	Work on goals	Collaborations		
			Work on goals		

Table 2. Indicators and sub-indicators of museum assessment, 2015-2020

The changes in indicators and sub-indicators can be read as **changes in the acknowledgement and operationalizing of value**. An example of this is the **varying emphasis on diversity**, both an evident value and an explicit indicator in some years. In general, the museums are awarded an overall assessment of their overall performance on the main categories of work, on a scale from **Very satisfactory to Unsatisfactory**. ACN describes their interpretation of these performance grades in the following manner:

"Very satisfactory" implies that the museum performs well on all the assessed indicators. These museums have strategic plans, a sound and sustainable development, good documentation, and a strategy to further improve the museum. These museums have also reported well.

"Satisfactory" implies good reporting on most of the assessed indicators, but also that there are specific challenges, missing strategic documents, missing or unclear reporting or similar. "Satisfactory" can also be given to museums with relatively large challenges, but with a good overview, good plans and measures, and a positive development.

"Less satisfactory" implies clear shortcomings and potential for improvement, often in combination with unclear or incomplete reporting. "Less satisfactory" can also be given to museums that also do a lot of good work in the area being assessed, if the shortcomings are considered to be crucial.

"Not satisfactory" implies critical deficiencies in several significant parts of the work, often in combination with unclear or inadequate reporting. By using this category, we question the museum's ability to operate in a sound and professional manner. (Arts Council Norway 2021, p. 4, our emphasis).

In the last evaluation report to be published, on museums' performance in 2020, a small number of museums get their work graded as Not satisfactory, mainly related to the quality of their conservation and storage facilities.

How do the museum professionals and the administration of Arts Council Norway experience the evaluation processes and publications? In general, the evaluation is based on a combination of the **annual reporting and self-assessment** from the museums, in addition to the general knowledge of the individual museums among the ACN staff. The museum leaders interviewed generally see the administrative necessity of the evaluations while also identifying some evident shortcomings of them. The shortcomings are mainly related to the experience of discrepancies between the practicalities and positive results of the day-to-day museum work and the results reported for evaluation. Commenting

on the development of the evaluations since they became public in 2015, a couple of the museum leaders nevertheless state that the evaluation quality has been improving, partly because of a dialogue between the council and the museums.

Both ACN and the museum leaders acknowledge that the evaluation process is clearly a trust-based system. The museums report on their results and on how they perceive their results as reflecting their stated goals and ambitions. In line with this trait of being based on trust, all interviewees also agree that the evaluation is not experienced as a New Public Management tool. In other words, the results of the evaluation, including potential low scores (“not satisfactory”), do not affect the funding of the museums.

2.4 Influence of public administration evaluation methodologies

Configuration of actors and organizations

The relevant actors involved in these evaluations are primarily the **state-funded museums** on the one hand and **Arts Council Norway** on the other hand. In addition, a third actor, though not explicitly involved in the evaluation procedures, is of obvious relevance to both these actors. That is the Ministry of Culture (MoC). MoC is the source of both governmental museum policy and the funding of the museums, which is distributed and managed formally by Arts Council Norway. The relation between these primary actors is one of continuous dialogue and dialectics: the Ministry of Culture defines, in collaboration with Arts Council Norway, the overarching aims and goals for the publicly funded museums. These fundamental goals are communicated in general white papers, budget documents and strategic documents. In addition, the Arts Council has an administrative role in operationalizing and communicating aims and goals to the museums, usually through annual grant letters, in which expectations and responsibilities are specified. On the receiving end of these documents and letters are the museums, required to perform politically sanctioned tasks and to report on their results. While this is a fairly formal and standardized relationship between the public funder and receiver of public funds, the limited size of the sector (and, indeed, the country) also opens up numerous personal contacts between the bureaucrats and practitioners.

Furthermore, **MoC** is also the governmental entity in charge of the Arts Council, which serves as a **directorate for the ministry**. ACN receives both funding and operating instructions from the ministry, and the ministry gets the annual evaluation of museums presented in separate meetings. They might also suggest changes or amendments to the evaluation procedures to align with the priorities of current museum policies. In other words, although there are two primary actors involved in this evaluation case, it is, in effect, a triangle of actors at stake here, represented by the museums, the Arts Council and the ministry. Regarding the distribution of power between them, there is no doubt that the central, most powerful agent is the ministry of culture, representing both the source of funding and policy priorities. At the same time, this power is kept in check by a strong emphasis on the arms’ length principle, both in the relationship between the ministry and the Arts Council and between the council and the museums. In addition to this primary level of involved actors, there is also a second level of involved actors, made relevant by the all-encompassing museum sector reform. The many museum mergers have resulted in a number of complicated ownership structures within the sector, with numerous boards, owners (formal and informal) and stakeholders for each consolidated museum. The sheer number of stakeholders with vested and varying interests in the operations of the museum is an ongoing challenge in a number of museums, also relevant to understand the evaluations of their performance.

Levels of formality, rational elaboration, publicity and salience

This evaluation is characterized by a rather **high level of formality**, as it is based on the annual and formal reporting from the museums. Based on this reporting, the ACN produces a formalized evaluation report, combining quantitative indicators and the use of a pre-defined qualitative scale of grades. The evaluation is part of the formal dialogue with the museums, but this is also accompanied

by more informal and ad-hoc communication. The evaluation practice ends up with a published report, although the level of public attention around the reports is not particularly high.

Context and time

As the evaluation is part of a **routinized dialogue between funded institutions and the source of funding/policy**, the evaluation practice takes place at regular intervals. The funded museums are required to report on their performances as part of the annual report, within a given date. This reporting is aligned with the annual application for funding. Thereby, the evaluation clearly falls within a chain of hierarchical accountability.

2.5 Tensions and their dynamics

There are several explicit and implicit tensions in the empirical data. The first one is a general tension that we think is relevant for the majority of museums in the Norwegian museum sector. Previous studies on the organization, professionalism and work of Norwegian museums have shown that conflicts regarding priorities between different forms of museum work are prevalent (cf. Hylland et al. 2020). These studies show, time and again, that there is a certain tension between all the different expectations these institutions are met with. In short, they are responsible for tasks as diverse as e.g. technical conservation of fragile objects, development of audiences and diversity of dissemination forms, and scientific projects and publications. This variety of responsibilities tends to create a **more or less permanent challenge of prioritization**, a challenge that clearly also is a value-based challenge.

Another tension that is evident in the above mentioned indicators and categories, is between **general and specific evaluation**. We see that there is a changing emphasis throughout the six years of evaluation, as to whether museums should be compared to a national average, to an expected minimum or to themselves and their own institutional goals.

Thirdly, the general tension between **quantitative and qualitative measurement** is also relevant in these evaluation reports. The Arts Council explicitly states that they use a combination of qualitative and quantitative methods, and a combination of numbers reported and written reports from the museums. The Arts Council seems to acknowledge after a couple of years, that there is a certain limit to what you might be able to measure with the use of numbers and statistics, discernible in a statement like the following:

The Arts Council's assessment methodology has developed from year to year. For a period of time number-based assessments were used as a tool for separating museums from each other and assessing their quality by subject area, which in turn formed the basis for a general assessment. [...] In 2018, we have ended this practice, as the assessment basis in several cases is too incomplete to carry out a number-based assessment. (*Arts Council 2018, p. 3*).

There is also a tension at play here between the general museum policy and the **contents of the evaluation methodologies**. Both the representative from Arts Council Norway and the museum leaders say that there is a certain distance between stated goals of museum policies and the evaluation and reporting being performed. Two examples of this are the steadily increasing importance of the general political goals of diversity and sustainability.

Regarding specific attempts to resolve tensions of value in the available data, the **changes in the reporting categories** and methodology can be interpreted as examples of such attempts. As the above-quoted statement from ACN indicates, the reduced importance of quantification can be read as a way of removing some of the issues related to measuring quality with numbers. In the interviews, an interesting upcoming development was also mentioned: There are plans to implement regular qualitative evaluations of all museums using a peer-review system, where a committee of experts evaluate the performance of single museums. Although it is not clear when (and if) this will be

implemented, it is a potential effort to resolve the tensions between existing evaluation procedures and the complexity of museum work.

In general, and as mentioned above, we know from previous studies that there are a number of value tensions, explicit and implicit, at stake in the Norwegian museum sector. These tensions seem to have partially increased as a result of the museum reform, affecting all state-funded museums. In short, museums are now expected to be grassroots, identity-based institutions on the one hand and university-level research institutions on the other hand. A number of museums struggle with this combination. In this context, an analytical challenge for us is not to let the knowledge of this fact guide the analysis too much while still looking for signs of such tensions within the annual museum evaluation system of ACN.

3. Pairwise comparison – cases 3.1 and 3.2

There is an evident contextual difference between the two cases. They are rooted in two different contexts of cultural policy – the Spanish case at the city level, and the Norwegian case at the national policy level. Furthermore, the time frame and the continuity of both the evaluation methodology and the entities to be valued differ. The Spanish case has also seen a **slight change** in policy goals as a result of a political change of local government, while the Norwegian case represents policy goals that are the result of **broad policy consensus**. The evaluation of Norwegian museums is, on the one hand, an integrated part of governmental museum policy: the methodology and the indicators are sanctioned by the Ministry of Culture, which is in charge of funding the museums in question. The actual evaluation is furthermore performed by a directorate (ACN) answering directly to the Ministry. On the other hand, there is a possible tension implicit in this direct connection to public museum policy. It remains a challenge to adapt the periodic evaluation to reflect the developing goals of cultural and museum policy, e.g., in their inclusion of digitizing, diversity and sustainability goals. Instead, in Spain, both analyzed cities represent a historical shift from mixed or creative city-oriented policies to new commons and cultural rights-based perspectives and experiments, which is partially explained by the emergence of post-2008 crisis new left parties and social movements. *Matadoiro* and the attempt to re-orientate *Fàbriques* towards proximity action are therefore inscribed in changing environments.

In general, both the Spanish urban regeneration cases and the Norwegian museum evaluation case are examples of place-based and (partly) building-based cultural infrastructure. Although the level of institutionalization clearly differs between the cases, what they have in common is that they entail a belief in the **cultural value of physical venues**. The more specific forms of value attributed to the venues are different. In the Spanish cases, there is an explicit, forward-looking expectation of the power of creative work to contribute to the development of neighborhoods, communities and cities in general. In the Norwegian museum case, the fundamental value perspective is related to the values of housing, preserving, researching and communicating cultural heritage.

An aspect that separates the Norwegian and the Spanish case is the **level of formality** regarding the actual evaluation methodologies. In the case of the Norwegian museum evaluation, this is a routinized and formalized procedure that takes place annually. The criteria and the indicators are used rather consistently and systematically, and they are also transparent and publicized. In the Spanish case(s), the evaluation procedures are, to a much greater extent, either informal, ad-hoc, pragmatic or – in the case of Santiago – non-existing. At the same time, the cases have in common that more informal contact between the evaluators and the people in charge of the evaluated institutions works as a tension-solving mechanism. In other words, even though the general level of formality is different, **both cases combine formal and informal procedures**. At the same time, the role of managers, either museums or cultural centers, is clearly comparable, as they serve as **value interpreters** in communicating and operationalizing the results of the evaluations.

Although visible in different ways, the two cases share a common tension in the universal opposition between **quantitative and qualitative ways** of evaluating cultural practice. In the museum case, there is a distance between the content of the evaluation and the evaluation indicators on the one hand and the experienced value of museums and museum work on the other hand. In the *Fàbriques* case, this is especially visible in the tension between social values and the aims to develop communities vs. the predominant quantitative evaluation practice. In both cases, qualitative elements are used (or attempted to be used) to take the specific character of each institution into account. In the Spanish case(s) however, this is so far attempted with little success, keeping informality as a main tension-solving mechanism.

Second pair – Indirect influence

4. Local grant-making in Spain (Case 3.3)

4.1 Case and background

Barcelona cultural grant making

The Barcelona City Council provides a wide set of grants for art production and promotion. These can be divided into those integrated into city-wide calls (the so-called "general call") and the *Institut de Cultura de Barcelona* (ICUB) calls for culture thematic projects. The latest cover funding for music halls, bookstores, galleries or cinema halls.

We examine the most prominent cultural grant line, the general call, which involves an investment of about 5 million euros. This policy is oriented towards more than 20 social issues and goals of the city, within which culture is one (Ajuntament de Barcelona, 2021). Under the specific culture line, the ICUB manages 14 programs and collaborates with other City Council departments in another 3 on education and culture.

A Commission designated by the ICUB evaluates all projects. These can get a maximum score of 10 points **distributed in two parts**, a) values corresponding to all city programs, up to 4 points, and b) scoring for the suitability of the project to specific assessment criteria for each ICUB thematic area (music, visual arts, popular culture, literature, etc.) up to 6 points. The final project assessment results from the sum of the points obtained in both criteria groups. Projects above 4 points are selected for funding (Institut de Cultura de Barcelona, 2022).

Variables	Maximum score
Capacity of the entity	4
Fundamentals and values	
Social or cultural impact of the project	
Economic viability of the project: solidity and financing	
Incorporation of the gender perspective in the project	
Incorporation of the ecosocial perspective, environmentalism and responsible consumption in the project	
Incorporation of the intercultural perspective in the project	

Table 1. City council funding criteria for all grant policy (Source: own elaboration based on Ajuntament de Barcelona, 2021; Institut de Cultura de Barcelona, 2022)

Variable and sub criteria	Maximum score
<u>Project quality</u> <ul style="list-style-type: none"> • Cultural and artistic interest: uniqueness of the proposal, artistic quality, originality of the approach, among others • Consistency: well-defined programming line and calendar, as well as a clear description of actions, activities and objectives • Risk, innovation and transdisciplinarity • Communication: communication plan, communication strategies and dissemination of activities 	3
<u>Social return and cultural link with the city</u> <ul style="list-style-type: none"> • Proximity work, involvement with the territory and with educational agents • Activities in collaboration with educational agents of the city • Inclusion actions (work with vulnerable groups and groups at risk of exclusion) • Actions to promote and create new audiences • Networking, articulation and connection of the city's cultural fabric • Clear commitment to local creators • Internationalization: Collaboration and/or international links 	3

Table 2. ICUB specific criteria for cultural grant policy. (source: own elaboration based on Institute de Cultura de Barcelona, 2022).

Since 2015, the government of *Barcelona en Comú* (BeC) manifested a desire to foster more representative and communitarian cultural policies and reform grant criteria, with a narrative that rejected this entrepreneurial turn of cultural policy (Barcelona en Comú, 2015).

Santiago cultural grant making

Grants to cultural enterprises play a significant role in the Santiago de Compostela cultural field (Linheira et al., 2018). Annual grants are intended to contribute to fostering Santiago city's cultural industry and projects. There are **two main lines of grants**: (1) One focuses on private entities (freelancers, companies and cooperatives), which is more prominent in terms of budget, and (2) the other focuses on non-profit entities. Each line has a pre-assigned budget by project or action, not per entity/organization. In 2021, the total budget was 555k€ with a limit by project budget of 35k €. Grants will not be called in 2022.

When the Compostela Aberta left movement won the City government in 2015, one of their campaign promises concerning cultural policies was the removal of the direct grants **repeatedly provided** to many entities over many years (30 in 2014). The distribution of cultural grants has been changing before and after the new PSOE government (2019). In the 2021 call only 11 grants were awarded approximately 85,000 euros.

The **evaluation criteria** depend on the project typology (i.e., cultural project open to the public and free access, etc.). Besides economic and artistic evaluation grounds, annual grant bases consider values and criteria such as gender equality, social involvement, rural city areas and downtown and neighborhood decentralization, diversification away from seasonal tourism and integration of youth audiences. In this way, although being a cultural-focused grant line, its social-oriented evaluative criteria scheme entails similarities with the Barcelona model.

4.2 Methodology

Similar to section 1.2, the methodological strategy used for these cases combined in-depth individual interviews with two discussion panels. **Semi-structured interviews** were set from an open and exploratory approach addressing value configuration and practices in specific evaluation methodologies. The **focus group** instead was designed to contrast and triangulate elements obtained from interviews in the second fieldwork stage. This discussion session focused on value tensions and disruptions among participants belonging to different organizations.

Purposive non-probability sampling was made use of. A total of **10 interviews** and **two focus groups** were conducted with the following actors:

Category	Barcelona interviews (Nr.)	Santiago interviews (Nr.)	Barcelona focus group (Nr.)	Santiago focus group (Nr.)
A. Administration agents, such as politicians and technical staff involved in grants design, evaluation and execution	1	1	1	1
B. External actors and advisors taking part in the evaluation and decision process	2	1	1	1
C. Users of the grant system, including artists and other members of local cultural organizations	3	3	2	1
Total	5	5	4	3

Table 3 List of informants' categories and number

Same **data analysis strategy** as for urban regeneration was applied (see section 1). Interviews are coded as follow:

Code	Affiliation	Field	Activity	Sector
P1	City Council	Local Cultural Administration	Program Manager	Public Sector
B1	Beneficiary	Visual arts	Consell de Cultura- Assembly Platform of Artists of Catalonia	Third Sector
B2	Beneficiary	Performance arts (theater)	Consell de Cultura- Performing Arts representative- ADETCA	Private
B3	Beneficiary and evaluator	Performance arts (music)	Catalan Association of Classical Music Performers	Third Sector
E1	Evaluator	Performance arts (music)	Freelance	Public Sector

Table 3. Interviews codes (Barcelona)

Code	Affiliation	Field	Activity	Sector
P2	City Council	Local Cultural Administration	Project officer- Councilor on Cultural Action	Public Sector
B4	Beneficiary	Visual arts	Regional Cultural Managers association	Third Sector
B5	Beneficiary	Performance arts (dance)	Dance City Festival. Member of PAM	Third Sector
B6	Beneficiary	Performance arts (dance)	Member of <i>Escena Galega</i> scenic professionals' association.	Third Sector
E2	Evaluator	Cultural management	External consultant. Member of AGPXC.	Third Sector

Table 4. Interviews codes (Santiago)

4.3 Findings

The **centrality of social value principles** in Barcelona, entailing redistributive and pro-equity policies, acts as a driver of evaluation methodology and is at the center of tensions concerning the grant system's artistic, economic and participatory goals. Such a core dispute is embodied by tensions between ICUB or Santiago administration and applicants. Instead, **Santiago's** methodology is ritualistic including social impacts as secondary criteria.

These policy orientations implicitly affect the **evaluation methodology**. For instance, through the ICUB assignment of fewer resources to high-quality artistic projects due to the need to provide a higher number of grants. Moreover, in both cities, tensions raised by social goals are addressed by expanding local support for the arts (i.e. through new grant lines or more budget). Evaluation practices are also affected by **exclusionary methods**. For instance, the installed capacity of applicants and limitations in the presentation and communication of projects in both evaluation cities represent an obstacle for economically weaker actors.

In this scenario, **informal and no written practices become "institutionalized"** as implicit strategies for legitimate and smooth evaluation. Shared and unspoken knowledge of these issues frames exchanges from both administration and evaluators/applicants' sides. In Barcelona, these include demanding more resources than planned for a project based on knowledge about negotiations or preparing dossiers with certain formal characteristics (graphic or communication tools). In Santiago, these informal strategies support the historical corporate and clientele system, however, with less legitimacy than in the Barcelona case; for instance, due to the **lack of participatory and arms' length** instruments.

4.4 Influence of public administration evaluation methodologies

Configuration of Actors and Organizations

From a broad perspective, the Barcelona **administration executive** and its Government Commission approving the Barcelona City Council's general call for subsidies are the highest-ranked organization setting the framework for grant policy. However, beyond this legal-administrative background, the **ICUB** is the leading actor in the system, (co)designing and implementing cultural grants.

Created in 2007, the **Culture Council** is another relevant actor in the culture grant system (Ayuntamiento de Barcelona, 2008). The arm's length organization is formed by representatives of local cultural associations, people representing the Cultural Councils of each District, and a representative of each of the political parties present at the City Council Plenary, among other

members. The Council intervenes in selecting jurors for culture grant-making (Ayuntamiento de Barcelona, 2008) and shaping evaluation criteria. Moreover, its members are often taking part in Evaluation Commissions.

Thirdly, the **Evaluation Commissions** are integrated by ICUB and independent experts external to the administration. Finally, the system is integrated by **individuals and organizations** (applicants and beneficiaries) applying to and profiting from Barcelona cultural grants.

In Santiago de Compostela, the ICUB equivalent institution in the city, **Cultura Compostela** (SCQC), plays the same leading role. However, no mediator or Council of Culture intervenes in this domain, empowering the Cultural Department's role as policy architect. In this case, there is an institutional Evaluation Commission (internal) integrated by the Culture Councilor of the government term and its permanent staff of 2 civil servants.

Levels of formality, rational elaboration, publicity and salience

The grant evaluation process involves **both formal and informal evaluation practices**. In both cities, evaluation is highly systematized and formalized via the legal framework defining a series of requirements and conditions for the granting process.

In **Barcelona**, this includes the "Grant award procedure" following the "*competitive competition regime*" and entailing the principles of "*advertising, transparency, competition, objectivity, equality, non-discrimination, effectiveness and efficiency*" (Ajuntament de Barcelona, 2021). Steps and protocols of such procedure are defined as a) application admission, b) evaluation of the project or activity presented, c) provisional resolution, d) acceptance, e) claims procedure, f) the reformulation of requests, g) final resolution, h) notification and i) term of the procedure (occurring within 6 months' time period).

However, **informal practices** have been identified within the above framework and as part of concrete evaluation phases, directly impacting grant (e)valuations and resolutions. In particular, these include jury conversations during sessions where final scores are negotiated among members of Evaluation Commissions. These conversations, often led by ICUB officers, are established among external evaluators, members of ICUB and also participants from the *Consell de Cultura*. Moreover, the rationale behind resource distribution and assignation promotes this informal practice. For example, the funds' allocation protocol lacks specification or presetting regarding the amount of funding to be granted by the type of selected project. Instead, all approved projects (more than 4 points) are accommodated into the available overall budget for each grant culture subprogram, which means that projects typically receive less subsidy than requested in the initial project application. Furthermore, it should be noted that details of such informal processes and discussions aimed at reaching a consensus are not entirely communicated to applicants/ beneficiaries.

In **Santiago**, similar informal processes are associated with the discretionary assignment of grants to a core group of institutions under the Spanish General Administrative Procedure Law⁷. The formal procedure entails similar milestones after the call of proposals a) application admission, b) evaluation of project presented, c) provisional resolution, d) acceptance, e) claims procedure, f) the reformulation of requests, g) final resolution, h) notification and i) execution and certification (occurring within a shorter period than in Barcelona). However, this is done through an Evaluation Commission with limited arm's length mechanisms and less workload capacity.

Contexts and time

Grant evaluations are conducted annually, published at the beginning of each year (January), and results are communicated within a maximum period of 6 months. At the end of the year, justifications

⁷ BOE-A-2015-10565 Ley 39/2015, de 1 de octubre, del Procedimiento Administrativo Común de las Administraciones Públicas.

need to be submitted by granted projects detailing administrative and technical compliance with provision conditions.

In **Barcelona**, the ICUB receives an average of about 1000 requests for cultural and artistic project grants to the above “general call”, which are processed by its personnel (Ajuntament de Barcelona, 2021c). ICUB technical staff, who are experts in a particular field (popular culture, visual arts, etc.), conducts the initial assessments (admission stage). Screened projects complying with basic requirements are uploaded to an online platform designed for this purpose, GESOL, which allows scoring them.

Evaluation Commissions organized by the ICUB include a minimum of two external appraisers for each project. In some cases, Commissions include three or four evaluators, i.e., when a member of the *Consell de Cultura* (Culture Council) is integrated into them as part of the assessment process. The evaluation process conducted by each Commission starts by individually scoring projects in the GESOL. Secondly, all of these scores are dumped into a large and shared file. Thirdly, a meeting is set up, attended by ICUB directors, external evaluators and the Culture Council, to bring up the scores for discussion. According to Politician 1, with a managing position in ICUB, the mechanic of the process is as follows:

We put all these assessments together and then we come across cases such as a project that someone has rated with a 4 and the other evaluator with an 8. Then each one will have to defend why they have given that grade. Beyond the grade, which is a very subjective thing (someone will say that a 6 is a very good grade and another that a good grade is a 9), similar projects are put in relation within each modality. We do a kind of peer-to-peer comparison. For example, visual arts fairs: we have Loop, the Gallery Weekend, etc. We compare them to adjust the scores to the realities we know. This is the function of the evaluation committee. Beyond the scores that each evaluator has given subjectively, they are shared and evaluated within their ecosystem, or a peer comparison is made. (P1).

During and after the above session(s), final scores are put on relation to a scale, the amount requested, and the amount granted in the previous year. All this process results in projects' selection for funding. As said above, this final evaluation involves accommodating the amount requested for the project to the overall budget of the ICUB for the general call. Therefore, the about five million euros available for subsidies are distributed among the 17 programs and all the approved projects. Lastly, all selected and rejected projects are published in the City Council web and mechanisms for appealing final decisions made public (final resolution and notification).

In **Santiago**, the grant process entails similar steps, but institutional SCQC evaluators fully control the whole evaluation methodology. The assessment and also reporting from beneficiaries focus on the bureaucratic dimension of granted activity. When certifying grants, this includes aspects such as invoicing, payments to justify the city funds, presence of city logos on communication items and a general execution report (nr. of young attendees, female artists integrated, events located out the city historic/center).

4.5 Tensions and their dynamics

Generally, the **ICUB** grant policy can be characterized as a **low-tension field** having achieved different consensual formal and informal mechanisms. Still, three primary types of value-related and interrelated tensions have been identified in culture grant making concerning values, actors and evaluative practices.

- **Values: Artistic quality vs values and criteria related to social inclusion**

Even under a consensus on the socially inclusive character of Barcelona's cultural policies, beneficiaries and artists embodying these value tension tends to point out different forms of artistic exclusion:

Social values are intended to be very inclusive in all aspects, especially in minorities, and in the end, they end up being exclusive within the framework of culture and the artistic interest they may have. And they can also pervert some artistic projects so that they fit so that they can fit into that channel well. (B3).

In this way, some actors perceive this policy as relegating formal aspects of artistic technique or quality on the one hand (B3) or as the outcome of academicism affecting less prepared or well-financially equipped artists on the other (B1). Besides the shared claim for more resources and investment in direct support to artists, calls for readjustments in evaluation analysis often transition between these two criticisms. Still, this tension is weak, implicit, and often diluted in conformity with the political project of the City Council.

- **Actors: ICUB and corporate partners vs some evaluators/beneficiaries**

Tensions between **actors** are represented by the opposition between some evaluators -with some applicants and beneficiaries- and ICUB -with corporate agents from facilities and institutions taking an essential role in grant structure-.

Once an organization or artist has obtained funding for their projects, they may likely receive grants again, as detailed by the same beneficiary: *"If it is the same (project), you have all the possibilities, and you will get the same money. If it is a little different, they will accept it, but they will give you the same money, even if it is a little different. And if it is very different, you will have to explain it."* (B3). Along these lines, funding distribution within and among sectors is challenging in Barcelona's grant-making policy⁸. Tensions emerging from the inconsistencies between the implementation of objective and impartial evaluative frameworks and the accommodation of evaluation practices to corporative commitments and clientele dynamics have been identified (P1, B3 & 5, E2). This is materialized in the annual recurrence of grants to extensive facilities over decades. Responsible from the ICUB indicates in this regard:

It is a problem of the subsidies, which in the end, are considered to be an automatic and perpetual source of finance when the bases clearly state that the fact that you get a subsidy this year does not mean that you will get it next year, nor that it should be the same or more. (P1)

According to some evaluators and members of the ICUB, this dynamic may have been supported by corporate governance, i.e., the representation of members of Council de Culture responding to corporate interest. Furthermore, some technicians of the ICUB taking part in evaluation sessions may have favored the reproduction of grants to big local institutions such as cultural centers or theatres.

Furthermore, the importance given to installed technical and economic capacity of organizations or projects affects how projects are funded, generating **financial-based exclusion**, as detailed by B4 when explaining the need for showing or simulating the financial viability of the project: *"It's a bit like a bank. If you have money, he gives you money. But if you don't have it, he won't give it to you. That's kind of the perception."* (B4). In this way, this tension is somehow explicit and growing while being addressed through negotiation and Commissions' participation in evaluation sessions.

⁸ As suggested by some interviewees, this dynamic may also play a role against innovation or creativity in art projects.

- **Practices: Official vs evaluators evaluation practices**

Some tensions have been identified concerning **evaluation practices**, in particular aspects such as the **interpretation of official criteria** by each evaluator. Moreover, methodological aspects raising tensions include the lack of **evaluation feedback** regarding obtained grants or the excessive academicism in presenting project dossiers manifested by beneficiaries and ICUB politicians.

Our analysis reveals that evaluation practices are generally framed and legitimated by introducing **independent experts** as the primary appraisal justification (Beneficiaries 3, 4, 5). However, once each expert is consulted, including ICUB and jury members, the process consists of negotiation among all parties toward a second valuation based on consensus. This process does not place objectivity as a technical goal but as a shared ethical concern. Therefore, actors often interpret the objectivity focus as a middle ground compromise among experts.

Along these lines, the City Council has conducted internal research on the evaluative behaviors and profiles of invited experts and found that while some of them tend to score very high, with 9 on average, others had a 3.9 for the same projects (Ajuntament de Barcelona, 2021b). For Politician 1, this analysis is a good instrument for the negotiation process:

That, even if it's about numbers, is always a very subjective component of your mental map. And obviously, this helped us because "hey, here we have two projects that are evaluated in two extremes." (...) Then you'd look and say, "Oh, damn, Arantxa has rated this. And for Arantxa, everything's good." And she'd say "Yes, maybe I've gone a little too far, of course...". Now look at the average and look at all the ratings; maybe instead of a new one, it would be good to give it a 7.5. And the positions are a little closer, the evaluators (...). (P1).

From the evaluators' perspective, this attempt to gain consensus over official evaluation frameworks is often a fruitless effort due to the relative nature of evaluative indicators (i.e. innovation) (E1). Divergent evaluators' interpretations of official indicators and their applications of the evaluative framework are addressed through open discussion, participation and negotiation. ICUB institutionally leads such a heuristic process. These methodological tensions are weak, shared but implicit.

In **Santiago**, also three central tensions have been identified concerning dominant values, actors and evaluation practices.

- **Values: artistic excellence/ technique vs economic** (as achievement of co-financing and timing in the sense of financial efficiency).

This tension relates to political and technical **evaluators' interpretation** of official value configuration, often seen by all actors as affecting aesthetic assessment due to the need to comply with socio-economic goals. However, this divergence does not significantly impact the actual selection of granted projects. This tension is weak, implicit and diluted in conformity with the political project of the City Council. Similarly, as in Barcelona, this tension has been inscribed in policy change since 2015 and has sustained over time since then.

- **Actors: political decision makers vs. cultural civil servants/ applicants-beneficiaries**

Actors' disputes often relate to the **cliente system** established between the same cultural industry organizations and the SCQC favoring automatic annual repetition of grants to the same projects and systematic entry barriers of other new ones. This is exacerbated by the required economic installed capacity needed to advance the funding.

In order to be able to apply for these aids, you must have a reserve fund that allows you to advance the money...which is complicated for small companies. And, at the same time, at least in the 2021 call, this policy does not contemplate the formulas associated with social economy either (B5).

This tension is somehow explicit and growing or being addressed through negotiation of other ways of funding. This includes extraordinary direct grants and contracts conceived as a "coffee for all" solution, namely further assignment of public resources to demanding parties.

- **Evaluation practices: beneficiaries and opposition councilors vs political decision makers**

In line with the above exclusionary socio-economic explicit and implicit components of the evaluation methodology, three evaluation practices and methodological issues raise concerns among actors. Firstly, the majority of grants are not accepted due to the lack of time of the eligible period to be executed when they are approved and co-financing and payments advancing. Secondly, the opacity of administrative feedback about excluded projects, which is asked to be done criteria by criteria. Lastly, the lack of understanding regarding concrete criteria used, which are seen as not innate to their cultural fields. These tensions are heavy, explicit and shown in a public debate between the government and opposition councilors. However, all actors are discussing responses to the lack of SCQC feedback, as in Barcelona.

Mitigation and resolutions

The ICUB strengthening of **participatory dynamics** in the evaluation methodology (including the intervention of the Council of Culture and final evaluation session) has supported a certain convergence concerning the social value framing of grants and projects. This mitigating strategy includes tools for reaching consensus within Commissions, such as studies on average scores by experts or improvement of communication with evaluators.

Instead, issues concerning the further redistribution of grant policy requested by evaluators, beneficiaries and the Council of Culture are not solved but mitigated through official claims against this dynamic. Besides its recognition, the ICUB has conducted further investment and **redistribution of resources** without affecting big cultural players (i.e., new grants for artists).

Lastly, issues regarding the actual evaluation methodologies have been addressed by ICUB through direct relation to sectoral representatives, negotiation in the final evaluation session and public recognition of lack of feedback (justified based on logistic and economic limitations).

Instead, the conflicting character of clientele and exclusionary dynamics in Santiago policies are not addressed by the SCQC, which has not established participatory processes with affected stakeholders regarding evaluation methodologies. Still, as in Barcelona, further redistribution of resources without affecting big cultural players (i.e. direct grants to concrete projects) has allowed the administration to stabilize the system.

5. The Cultural rucksack-TCR (Case 3.4)

5.1 Case background

TCR is a national programme designed to **ensure that all school pupils in Norway** experience and **develop an understanding of artistic and cultural expressions**. The activities must be of professional quality and cover a variety of expressions: film, cultural heritage, literature, music, performing arts and visual arts. TCR has been part of the government's culture policy for primary and lower secondary school students since 2001, while upper secondary school students were later incorporated into the programme. This means that all students currently experience professional art and culture through TCR, from first grade to the final grade of upper secondary school.

TCR is a collaboration between the **Ministry of Culture and Ministry of Education and Research** and all counties and municipalities throughout the country. *Kulturtanken – The Cultural Rucksack in Norway* was given national responsibility for the programme in 2016. At the same time, more hands-on responsibility for the programming was moved to the regional level (the counties). In other words, TCR is a collaborative project between the cultural and education sectors on the national, regional, and local levels and encompasses all schools in Norway.

The TCR administration is part of the regional cultural administrations and are responsible for regional coordination and programming, although the municipalities may also develop their own programs in addition to what the county is offering. The size of the TCR administrations differs from county to county, but they are typically organised with one administrative manager, a few TCR producers, and one or several persons working with touring schedules and taking care of practical, logistic, and mercantile issues. In this analysis, the key actors are the TCR producers, who are the curators working individually and in small teams doing the valuation and selection. The producers are involved in pre-production and often have hands-on responsibility for finalizing the productions. They are skilled bureaucrats, many of them art educated, who keep themselves updated on new productions within their field of expertise (performing arts, music, visual art, etc.).

5.2 Methodology

The data is based on **qualitative interviews, participant observation**, and a **digital questionnaire**. The participatory observation was conducted as a two-day stay at one of the main events in the TCR-system, the annual performing arts showcase expo *Showbox* in Oslo. This event includes meetings, showcases and networking, bringing together all the major players within the TCR: cultural producers/artists, county bureaucrats and TCR producers, etc. After the fieldwork, we followed up with a digital questionnaire, sorting out administrative routines with regards to quality assessments and selection criteria within regional TCR administrations. The survey went out to all counties present at Showbox. Based on responses to the questionnaire, three counties were selected for in-depth group interviews. We also included interviews with two individual cultural producers who have been selected and distributed in TCR. The total number of interviewees were nine. The interview data were imported into the analysis software Nvivo, and analysed by using SDI, stepwise-deductive inductive strategy for analysis (Tjora, 2019).

Category	Interviewees (Nr.)	Observations (Nr.)	Digital questionnaire (Nr.)
A. Administration agents, such as TCR producers	7	App. 30-40	17
B. External actors and advisors	-	App. 10	-

Table 1. List of informants' categories and number

5.3 Findings

The TCR producers draw upon different resources in their work with evaluating and programming the regional program. One important resource is the national *DKS-portalen*, the TCR Portal, which is a web-based platform developed and administered by Kulturtanken. The portal is the platform in which artists and cultural producers submit their proposals consisting of descriptions of the productions, the producers, the performers, and budget information. The proposals often include videos or sound recordings to give a comprehensive presentation.

The TCR producers do a preliminary sorting and decide what they want to take a closer look at. They are quite free to select cultural productions based on their professional competence. However, the TCR producers highlight that it is important that the final programme does not reflect the biased preferences of the individual TCR producer. One TCR producer said humbly:

I am not the one to decide what is good art. [...] And the pupils should experience a variety, not only the things that I personally think is good.

Hence, they usually discuss decisions with their colleagues and sometimes also with the TCR producers working in other counties. One of them emphasized in an interview that it is always important to discuss with professionals representing different backgrounds and values. And another pointed out that in cases in which there happens to be a conflict of interest (such as impartiality within the TCR administration), they can ask another county for a second opinion.

Some TCR administrations also have established a program council which is involved in the final decisions. Such program councils often include schoolteachers and pupils, to secure the level of relevance and participation from the target groups. Some productions are possible to experience live at annual showcase arenas which has a TCR perspective, such as Showbox, or other art festivals and events which do not have a TCR connection. The TCR producers often visit such arenas, festivals, and events as an important part of the valuation work and to keep themselves updated on what is going on in the field.

The TCR portal includes **many proposals every year**. Even though the portal offers different sorting and filtering functions, the TCR producers express that the number of proposals is overwhelming, and it is almost impossible to review them all. The abundance of available productions in the portal serves both as a source of diversity (good) and confusion (frustrating), and this has in some counties led to the TCR producers making their own systems for checking out and finding relevant artists and productions. To a certain degree they also rely on recommendations from colleagues and other professionals who they trust.

Completing the regional tour schedule constitutes a combination of different criteria, needs and practicalities. A first criterion is **genre diversity**: The programming often has a long-term scope. Over the years, pupils should have the opportunity to see productions from different genres. This means that a TCR producer must consider what has been showcased previously when making plans. Normally, there are a lot of concerts and theatre productions available for programming, but it is important also to include productions based on literature, visual art, and cultural heritage. Choosing crossover productions that include more than one genre, such as musical productions, or theatre

productions based on books, often make it possible to offer each pupil a diversity of genres within the limits of the budget.

Second, the TCR producers highlight **aesthetic quality** as a primary criterion for admission to the program. To be selected, the productions must meet the TCR producers' quality standards when it comes to the artistic idea as well as the implementation. The production might be a simple one man show or a complicated production with several performers, but every element must fit into the production. A TCR producer expressed it like this:

Theater is a juxtaposition of different elements. Music, scenography, costumes, text, dramaturgy, light, sound, movements. I don't care whether all these elements are included. It can be fine with just one person standing talking in a black sweater. But if there *is* a scenography, it should be thought through, and it should fit the rest of the choices you have made. [...] It's a total package. If it is a really good mediation of text, but the scenography seems to have been scraped together in the nursery, then the one thing kills the other. So, the different elements must support each other.

However, the valuation of aesthetic quality is obviously a subjective judgment, even when done by professionals. On a practical level, the quality of specific productions is not always judged equally by TCR-producers in different counties. TCR producers we interviewed had seen some of the same productions live at Showbox but had different opinions of them. For instance, a specific theatre production was described like this by one of the interviewees:

I think they manage to mediate the text in a good way, they manage to make it accessible to the target group. [...] Here they have made some good choices. It has a well-functioning dramaturgy.

Another interviewee, however, judged the same production completely different:

We have agreed that we won't go further with that one. The artistic quality isn't good enough, and they don't manage to make the material topical in a way that makes it important enough to the current audience.

Third, the pedagogic **relevance** of the productions might also be a matter of concern. Some productions can easily be directly linked to learning objectives in school curriculum, such as theatre productions which are based on parts of the literature curriculum in the upper secondary school, or which through its topic deals with issues such as, e.g., netiquette, drugs, mental health or other edifying topics. In some cases, the TCR producers value such relevance as a good thing, at least if the aesthetic quality is high. According to the TCR producers, the schools often welcome such productions, particularly schools in the upper secondary level. However, the TCR producers hesitate to choose productions in which the pedagogic element is too much emphasized:

Some productions try very hard to be pedagogic, the topics are very explicit social, on kids being hit, kids who have Down's syndrome, the productions might even be developed in collaboration with organisations, a bit like non-smoking-campaigns. [...] They are obviously a bit moralistic. When it is very explicit which learning objectives they try to cover, I think it often appears a bit pasted on the outside of the production, it becomes a bit artificial. However, there are a lot of topics in the curriculum, which means that almost every production we distribute has some connection to the curriculum. Not because they have tried to tweak it [the production], but because the curriculum covers so much. It covers life in general.

According to the cultural producers interviewed, adjusting the productions to the school curriculum is out of question.

The TCR producers also emphasize that a TCR experience may represent an important break in the school day by being "just" an art experience. According to the TCR producers, many schools also **prefer**

such productions rather than the ones which are clearly framed as educational. One of the TCR producers also expressed the importance of not underestimating the value of pure entertainment. She described why she chose a production based on the Harry Potter universe, obviously a quite commercial but humorous production:

They have made it like that because they know it will be a hit. [...] But we thought that even if there are made some very commercial choices, we actually have a target group who wishes to be entertained. And we should respect such a wish. We, the adults working in this field, often tend to think that what is fun isn't of good quality. But we should be careful thinking like that.

Fourth, even though many productions are selected because of their aesthetic qualities, not their educational content, the TCR producers take into consideration some **national guiding principles** concerning big cultural policy issues on e.g., diversity, human rights, and democratization. The program needs to reflect the diversity of the Norwegian population. According to the TCR producers, it also happens that they include productions that has a link to important national celebrations, such as the Queer Culture Year 2022.

Fifth, programs should over time include both local/regional and non-local artists in order to **build local/regional artist careers** and **competence clusters**. To a certain extent, the TCR administration is an important employer for artists in the region. A TCR producer working in Northern Norway states:

We have a regional strategy on Culture, saying that performers from Northern Norway should be prioritized. So that is a guideline.

And another one, working in Southern Norway, reflects on the same issue:

I think that we are an important employer for the artists. I am aware of that. But our primary focus should be the children. I do not choose a production because those artists are hungry and need the job. But perhaps I am a bit aware of that when it comes to circulation, that a theatre company should not stick with us for twenty years. Then someone else perhaps should get the chance instead.

Evidently, the TCR producers have a wide range of criteria and needs to consider when doing the valuation and selection of productions for the seasonal TCR program. Moreover, quality in TCR is defined by what we call **institutional dramaturgy**, which refers to how material framework impacts on aesthetic practices. Here, the formal scope determined by the schools in particular impacts on artistic decisions and productional design. Most important is production length (45 min. max), relevance (in terms of school curriculum), outreach (in terms of reaching out to a large audience), size of production and ensemble (max 3-4 people, and small scenography).

Another valuation tool often referred to in the field of performing art is *The Divining-Rod Model [Ønskekvistmodellen]*, a Danish dialogue model particularly developed for the valuation of performing art (Langsted et al., 2003). The fundamental logic of the model is that any performance, production, or play may be evaluated along three lines – or, in the metaphor of the divining rod – along three branches: **Will, Skill, and Agency**. *Will* describes the artistic will, ambition and intention of the artist, performer, or performance – the will to express and the will to communicate. *Skill* describes the artistic ability and craftsmanship of the performance or piece of art, the degree to which the artists possess the necessary skill. **Agency** describes to which degree any play or piece is experienced as relevant or necessary in the sense that it engages in relevant communication and resonates with an audience. Besides being three separate aspects to be considered when assessing quality, the point of the model is also that there is an ideal for balancing the different aspects. Even if a piece or performance may be marked by a very high level of craftsmanship, it is not considered to be of high quality if the artistic will or the ability to be relevant is at a low level, and vice versa. In the interviews, several TCR producers said that they use this model as a basis for the dialogue in the program council. One interviewee said that:

It is hard to do it very schematic. But we always start the program council meeting with going through Ønskevistmodellen, so that we have a common basis for valuation.

Another interviewee said that “*We don’t talk that much about Ønskevistmodellen, but it’s there, like a gut feeling or a spinal cord reflex*”. Some of the interviewees had developed their own ranking systems, more or less based on Ønskevistmodellen, or based on simpler forms with spaces for emojis or plus/minus-signs in order to make it easier particularly for the pupils participating in the program council to verbalize their opinions about the different productions. One of the TCR producers expressed her experiences with schematic forms like this:

I have tried it out, but I felt it turned out to be throws of the dice, instead of good dialogues. I rather want the good round table discussions.

At the end of the day, the tools for valuation are not highlighted as the most important in the valuation work. According to the TCR producers and their leaders, it seems that the **competence and the professional assessments** of the TCR producers are the crucial resources which these selection processes rely on. In fact, Ønskevistmodellen is also developed to be used by highly qualified professionals with art education, not amateurs or bureaucrats without art education. In other words, the model itself also emphasizes the significance of professional assessment done by qualified individuals.

5.4 Influence of public administration evaluation methodologies

Configuration of Actors and Organizations

The TCR infrastructure is constituted by the TCR administrations at the regional level as the key actor. Artists and cultural producers represent the providers, and the schools represented by school administrators, teachers and pupils represent the users. The infrastructure also includes Kulturtanken, the national administrator of resources such as the TCR web portal, and the two Ministries of Culture and Education.

Formality, rational elaboration, publicity, and salience

The evaluation of TCR productions is characterized by both **formal and informal practices**. The evaluation rationalities are not communicated systematically to stakeholders or the public as such. However, national and regional TCR web sites offer information about TCR in general, productions and programming. The public attention around TCR is relatively high.

Context and time

The processes of production proposals, evaluation, programming, and touring are repeated every year in accordance with regional annual schedules.

Value stabilization

The valuation of culture within the context of the Cultural Rucksack can be described as a tricky puzzle where aesthetic qualities are prioritized but balanced and negotiated with more instrumental qualities such as pedagogic relevance, regional development, national cultural policy objectives and institutional dramaturgy. In addition, the negotiations must be done within budget and bureaucratic administration standards, which is also a stabilizer.

5.5 Tensions and their dynamics

Several tensions can be detected in the TCR evaluation methodology. **Aesthetic quality** standards are often held to be the most important criterion for admission to the programme, however, such quality is negotiated by the TCR producers and balanced with other quality measures. We can detect a tension between the quality of high culture and entertainment, which to a certain extent can be described as a tension between the adult perspective of paternalism and the pupils’ desires for popular culture. There is also a tension between **artistic quality and pedagogic relevance**, even though the first one

seems to be emphasized by both the TCR producers and the schools. However, according to the cultural producers interviewed, the pedagogic relevance is more emphasized than what is claimed by the TCR producers. A third tension is the one between **global quality standards** and the **expectation of building local/regional artist careers** and competence clusters by offering jobs to artists living in the region. Finally, there is also a tension between national cultural **policy** guidelines on **diversity**, human rights, language, and democracy on the one hand, and aesthetic values as well as more local values on the other.

Structure of tensions

The tensions can be analysed by using selected concepts from pragmatic sociology. Table 13 gives an overview of the different tensions of this case, with parallels to the different common worlds outlined by Boltanski & Thévenot (1999; 2006) and Boltanski & Chiapello (2018). Notice that the application of the common worlds is a bit schematic. In real life, situations of justifications often are not completely pure but influenced by different worlds at the same time.


Values present	Common worlds	Tension	Common worlds	Values present
The value of high culture	Primarily the inspiration world, but also the world of fame (in terms of artistic recognition)		The world of fame	The value of popular culture and entertainment
The value of global aesthetic qualities			The world of network, the market world	The value of local and regional clusters and city attraction
The value of the autonomy of art			The industrial world (competence, learning), but also the civic world (democracy a.o.), and the domestic world (heritage a.o.)	The value of relevance in terms of school curriculum
The value of aesthetic quality			The civic world, the domestic world	The value of relevance in terms of national cultural policy

Table 2. Tensions and common worlds detected in the TCR evaluation process

Evolution of structure and characteristic

The tensions in TCR evaluation have been more or less present since the programme was established in 2002, but lower budgets in recent years seem to make the balancing of criteria more difficult. After 2015, more power and responsibility for evaluation and programming moved from the national level to the regional level (the counties). This process of regionalization opened possibilities for using the TCR as a tool for building local artist clusters, at a possible sacrifice of global aesthetic standards.

Mitigation and resolutions

The TCR producers mitigate the present tensions in several ways. First, the **budget** does not allow for giving every pupil in every school access to all genres and all kinds of topics each year. Hence, the TCR producers make use of long-term planning strategies to ensure that every pupil is offered a balanced TCR program that, *over the years*, includes all genres and diversity in topics, relevance, and local and non-local performers.

The TCR producers are aware of their power as employers for the local and regional artist population. Hence, when they have programmed specific artists for some years, they look for new ones to include in order to even out.

The TCR producers also have the power to contribute to the improvement of the quality of the productions by offering resources for pre-production work. One of them described a specific case:

I have two local performers that I think lack a bit in their project. They lack a bit of speed and liveliness, the music is a bit monotonous, and the production is too long. Sometimes I think they make the wrong choices. But because they are situated in our region, I want to use them, instead of choosing somebody from Oslo. It is also part of our mandate to give artists from our region job possibilities. And then I choose to run a pre-production phase to level it up.

To sum up, the conflicts are solved by a combination of strategies such as **long-term planning, balancing and improvement**.

6. Pairwise comparison – cases 3.3 and 3.4

The Spanish grant-making cases and the Norwegian TCR case are all examples of cultural policy measures established to contribute to the production and/or distribution but also part of very different political and institutional contexts. In the TCR case, the target group for the chosen art and culture projects are school pupils from the age of 6 to 19 in all schools throughout the country. The grant-making cases are not related to a school context, as they are part of local cultural policy in the two cities of Barcelona and Santiago de Compostela. The target group for granted projects in Spain might be the general public/city dwellers, artists and visitors, but this may vary from project to project.

Even though the cases are quite different in context, content, and shape, they are both based on **experts' evaluation activities**. The Norwegian TCR programme is grounded in national cultural and educational policies, but the evaluating experts are part of cultural administrations at the regional level. In grant-making cases, the evaluating experts are part of the city councils at the local level (internal experts) and independent experts (external experts). Moreover, the Spanish cases are, to a certain extent, rooted in and influenced by the current **political orientations** of the city governments, while the TCR case is less government/party aligned.

The evaluation processes in all cases are characterized by a combination of **formal and informal practices**, organized through annual phases of preliminary evaluation and sorting, screening and informal peer discussions, and subsequent decisions to produce a final selection. The experts in all cases possess artistic/cultural competence, although to a lesser degree in Santiago's case. However, they also have the role of bureaucrats (in grant-making cases, at least the internal experts are bureaucrats). Additionally, in the TCR case, the experts also have a third role – the role of curators or producers. The use and relevance of aesthetical competence as part of the evaluation methodologies seem to differ between the Spanish and Norwegian cases.

Evaluation methodologies in all cases include the **use of online platforms** (partly as a tool for measuring projects numerically and parsimoniously through an index or similar) and pre-established criteria. However, the evaluations in the TCR case seem to be more based on the experts' individual professional experiences than what seems to be the case in the Spanish grant-making procedures. The cases are similar regarding the (lack of) **transparency** of the evaluation criteria; in all cases, the criteria are not entirely communicated to either the applicants/cultural producers or the general public.

In all cases, there is an overwhelming number of productions/projects/applications to select from. There is a mismatch between the number of submitted projects and the review capacity of the evaluators. Hence, there might, in all cases, be a risk that economically strong actors are better equipped to submit noticeable applications which stand out from the multitude of projects.

There is also a difference in the cases regarding the involvement of **representatives from the "end-users"**. For example, some TCR administrations include programme councils with schoolteachers and pupils in the TCR case. In contrast, in the grant-making cases, there is no such involvement from "end-users" in the evaluation processes, except for the intervention of members of artists and cultural organizations in the Council of Culture taking part in the selection of juries and criteria definition only (not in the selection/evaluation step).

Aesthetic quality standards are held to be the primary criterion for selection in the TCR case. This value is **negotiated and balanced** with more instrumental qualities such as pedagogic relevance, regional development, national cultural policy objectives and institutional dramaturgy. The grant-making cases seem to be more **consensus-oriented**, characterized by weak tensions between artistic qualities and social inclusion (Barcelona) and artistic qualities and economic values (Santiago).

In the TCR case, the tensions are mitigated through **long-term planning** and programming in order to include all categories and criteria over the years, alternation of productions and producers in order to even out the benefits, and quality improvement by offering resources for pre-production. In grant-making cases, the tensions are mitigated by **strengthening participatory dynamics** in the evaluation

methodology and by redistributing available resources. The latest often involves increasing the overall grant budget without significantly affecting corporate structural dynamics consisting of the repetition of grants for "big players".

7. Topic-level discussion

In this Deliverable, we have examined the **influence of public administration evaluation methodologies** applied to monitor **public heritage** management on the one hand and used for decision-making in policies supporting independent **cultural production** on the other. Our two pairs of cases have allowed us to contrast the evaluation methodologies operating in those two areas, which we characterize as Bureaucratic-led and Experts-led, in two very different contexts: in Norway at the national level of administration and in Spain at the local level. Differences related to both contexts affect the two methodologies that we analyze in roughly the same way: they tend to be more formal in Norwegian than in Spanish cases, while Spanish cases show more political influence in evaluation processes than Norwegian ones. From the perspective of these differences, the contrast between the two evaluation modalities is quite apparent.

Experts-led evaluation methodologies establish a certain barrier between evaluators and the evaluated artists or cultural professionals. Evaluation is performed without communication between them, and evaluation criteria lack transparency. On the contrary, Bureaucratic-led evaluation methodologies are based on communication and negotiation between evaluators and those evaluated, particularly about the evaluation method applied.

Bureaucratic-led evaluation methodologies are governance mechanisms, which makes governance tensions, such as that between the use of general, homogeneous parameters and the use of specific, heterogeneous ones, a particularly salient tension in this system. Through it, other tensions related to the values of the assessed contents (institutional performances) can be refracted. For their part, Experts-led evaluation methodologies are selection mechanisms, which makes that contents (in this case, artistic projects and performances) are the predominant level at which tensions manifest. Here tensions between the values considered are more prominent.

In Bureaucratic-led evaluation methodologies, procedure (reporting) constitutes the central element, which managers of institutions interpret. There is a strong focus on the contextual and instrumental aspects of the evaluated performances, which are predominantly measured in quantitative terms. Tensions materialize in the reporting procedure and are mitigated by adapting its format and dynamic. On the contrary, in Experts-led evaluation methodologies, evaluators are the most crucial element. There is a clearer focus on the content, and evaluators' perspectives and qualitative measures predominate. Tension mitigation goes through improving participation and accessibility.

Both kinds of evaluation methodologies have the capacity to shape or settle values such as artistic autonomy and artistic excellence, citizen participation or economic promotion, as well as to influence behaviors. In this regard, three dimensions of the findings can be highlighted.

Firstly, we have identified that evaluation methodologies play an **important role in shaping** artists and other cultural field actors' behaviors. For instance, the decrease in budget allocation to selected projects in the Barcelona grant evaluation system is a factor influencing artistic projects design, evaluators' perception of measurement and the actual selection of more projects with the same overall budget. While this is seen as a socially driven approach to evaluation by some actors, it is also interpreted as a methodology affecting artistic quality or opening the door for clientele dynamics favoring corporate actors.

Secondly, there is a noticeable **link between evaluation methodologies and legitimization requirements**. When focusing on evaluation practices, we have identified that policy goals are aligned with specific power correlations determining the legitimate **evaluation instrument or actor**. In institutional-dependent heritage evaluation, bureaucratic-led evaluation methodologies allow to align each public venue with cultural policies' overall public and political goals. Within this regime of evaluation, the previously established value of physical spaces seems to play a role in defining a more routinized evaluation framework. Differently, in arts project evaluations subjected to open competition, this focus moves to experts' agency and capacities, as in the case of grants. Such

differences can be explained by the concrete forms of governance and methodologies concerning each evaluation process, integrating further peer review and short-term performative protocols (working sessions, informal conversations, etc.) in the case of projects. But they also correspond to different types of requirements in terms of legitimacy building towards evaluated actors. In this regard, for instance, the creation of the Conseil de Cultura in 2007 as a mediator in Barcelona's cultural policies sought to enhance such legitimacy from an arm's length approach.

Finally, evaluation interpreters are key value tension stabilizers, but their role is relative to the whole regime of justification. The weight of evaluation outcomes in terms of their **legitimacy** is also placed on **mediators and mediation mechanisms**. On the one hand, in bureaucratic-led evaluation targeted to heritage, managers of spaces and institutions act as closer and more stable actors responding to official criteria towards citizenry. On the other hand, in project-based resource allocation, other mechanisms are used to build legitimacy and guarantee administrative assessment principles and legal requirements, such as objectivity and transparency, which are not at the core of official heritage evaluation. Typical tools supporting expert-led evaluation are arms-length mechanisms for selecting juries, the actual experts' reputations and diversity or their short-term involvement in assessments.

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