**UNCHARTED**

Understanding, Capturing and Fostering the Societal Value of Culture

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| Included (indicate as appropriate) | Executive Summary | ☐ | Abstract | ☐ | Table of Contents | ☒ |
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This deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

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# 1. Workshop Rationale

The second co-creation workshop of the UNCHARTED project is held in Barcelona, at Centre d'Estudis i Recursos Culturales, on 15-16 June 2023. The workshop happened in a hybrid format, in co-presence and remotely.

This workshop gathers members of the Advisory Board, invited stakeholders from the various fields related to cultural policy and cultural institutions, and partners of the consortium who are part of the research process. The aim is to debate with actors about the central issues investigated during the UNCHARTED research in order to deepen our understanding and, at the same time, to generate new hypotheses and research questions in the run-up to the comparative analysis to be completed afterwards and to look forward to the production of final project's outcomes. The workshop is led by UB, the project coordinator, in collaboration with CNRS, lead partner of WP4, and ELTE, lead partner of WP5.

More precisely, the workshop was aimed at (1) discussing ongoing publications about WP1, WP2, and WP3; (2) presenting and discussing the results of WP4 and WP5.

The WP4 "Analysing political intervention and impact" addresses the central challenge of assessing the strategies and effectiveness of cultural policy and institutions in taking full advantage of the potential benefits of culture for society. WP4 is divided into two strands. Strand 1 deals with cultural policies carried out by public administrations at different levels (European, National, Regional, Local) and is interested in their internal and external coherence (partners involved: CNRS, UB, Telemark); Strand 2 deals with "cultural institutions" and is interested in the analysis of their impacts (partners involved: ELTE, UP, Goldsmiths, UB). Another deliverable in WP4 is the "roadmap for cultural policy action", which aims to derive general policy guidelines from the analyses carried out in the two Strands (all partners involved).

The objective of WP5 is to validate the results of the various research tasks carried out in the UNCHARTED project in several concrete experiments and demonstrations carried out by citizens, professionals, administrators and policymakers, covering the three axes where the development of cultural values is studied. Axis 1, "Cultural strategic planning", aims to reflect on, verify and demonstrate how the values of culture identified during the project impact the strategic planning of cities' cultural policies. In particular, they will investigate certain contexts – in Italy, Portugal and the European level – where city administrations have planned strategies and public policies in the cultural field. Axis 2, "Culture-led urban regeneration", considers the values of culture that the local administration that leads the process recognises and seeks to promote throughout its action and the repercussions of said action on the actors and institutions involved. Within WP5, the phenomenon of culture-led urban regeneration is approached differently. It will try to reconstruct, to begin with, the sociohistorical parameters that determine the organisational approach manifested by processes of cultural regeneration in a given urban context. Axis 3, "Cultural information system", will promote an experimental data collection operation by cultural information institutions in collaboration with alternative data providers (i.e. cultural and creative organisations, cultural sites, etc.) aimed to enlarge the coverage of the plurality of cultural values in cultural practices. The feasibility of implementing innovative measures will be assessed to better cover the plurality of cultural values in cultural practices.

The workshop program included an introduction session, sessions devoted to publication plans (Session 1 from Thursday sessions), and sessions about WP4 and WP5. These last sessions were organised following the same plan: first, the main objectives and proceedings were presented in a general session were advisory board members and stakeholders were invited to give their feedback; second, the discussions were organised in small groups devoted to the strands or axis of each WP; finally, a wrap-up discussion was organised to present a synthesis of the small group debates and conclude the session.

## 2. Participants

The participants included the totality or the representatives of all the Consortium teams, some members of the Scientific Advisory Board, invited stakeholders and keynote speakers:

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| **Consortium** |
| Partners come from 7 European Countries: France, Hungary, Italy, Norway, Portugal, Spain, UK. |
| 1. **Universitat de Barcelona** (Coordination): María Andrade [remotely], Arianni Batista, Victoria Sánchez Belando, Clara Levy, Uxio Novo Rey, Alain Quemin, Arturo Rodríguez Morató, Mariano Zamorano, Matías Zarlenga. |
| 2. **Eötvös Loránd Tudomanyegyetem**: Eszter György [remotely], Gábor Ólah, Gábor Sonkoly |
| 3. **University of Coimbra**: Nancy Duxbury, Sílvia Silva [remotely], Cláudia Pato Carvalho [remotely], Paula Abreu [remotely] |
| 4. **University of Bologna**: Paolo Ferri, Jessica Tanghetti |
| 5. **Telemark Research Institute**: Ola K. Berge, Åsne Dahl Haugsevje, Ole Marius Hylland |
| 6. **CNRS**: Julien Audemard, Félix Dupin-Meynard, Emmanuel Négrier |
| 7. **University of Porto**: João Teixeira Lopes, Lígia Ferro [remotely] |
| 8. **Goldsmiths, University of London**: Cecilia Sosa |
| 9. **Promoter S.r.l**.: Antonella Fresa |
| **Advisory Board** |
| Michael Hutter – WZB Berlin Social Science Center |
| Ulrike Meinhof – School of Humanities, University of Southampton |
| Kate Oakley – School of Culture and Creative Arts, Centre for Cultural Policy Research, University of Glasgow |
| **Invited stakeholders** |
| Vera Borges – ISCTE, Portugal |
| Amarílis Felizes – PLATEIA, Portugal |
| Rosa Gibert Pibernat – ICUB, Barcelona |
| Francesco Molinari – SP-MESOC, University of Valencia |
| Pau Rausell Köster – SP-MESOC University of Valencia |
| Eva Soria Puig – ICUB, Barcelona |
| Montserrat Tort Bardolet – ICUB, Barcelona |
| Francesco Zollo – Italy |

# 3. Workshop Sessions

## Thursday, June 15<sup>th</sup> sessions

## Opening session

**Chairs:** Arturo Rodríguez Morató and Matías Zarlenga – Universitat de Barcelona

*Welcome message by Arturo Rodríguez Morató – Universitat de Barcelona*

After welcoming the participants and especially Cecilia Sosa, the new member of the consortium representing Goldsmith at this workshop, Arturo Rodríguez Morató (coordinator of the project) announced the upcoming schedule, with a first day focusing on WP4 issues, and a second day focusing on WP5 where stakeholders will be present. Arturo reminded that Gábor Sonkoly (Eötvös Loránd Tudomanyegyetem) would join the workshop on the second day and that some consortium members are attending online. The members of the advisory board who are present are Michael Hutter (WZB Berlin Social Science Center), Ulrike Meinhof (School of Humanities, University of Southampton) and Kate Oakley (School of Culture and Creative Arts, Centre for Cultural Policy Research, University of Glasgow). Clara Levy and Alain Quemin (University of Paris 8-University of Barcelona) are also attending, Alain having accepted to play the role of advisor for the WP4 sessions.

He gave additional details on the workshop organisation, with most sessions in the main auditorium, except the parallel sessions. While most parts of the first day will be devoted to WP4, other important issues are also on the agenda, like the publications of results from previous work packages and the policy-oriented deliverables to be produced by the end of the project.

To conclude this introduction, Arturo provided information about two upcoming events. The first is the joint policy event with INVENT and MESOC, UNCHARTED sister projects. It has been decided to dedicate the joint meeting to the connection between arts and health, or more generally between culture and well-being, a topic of high interest for the European Commission. The even is scheduled for June 21st.

The second one is the next policy seminar. While it was supposed to happen in Brussels, this policy seminar will occur in Budapest during the last week of November or the first week of December 2023. The exact dates for this policy seminar will be communicated very soon to all the consortium members. The idea is to organise a two days meeting: the first day could be devoted to the policy perspectives coming out from the project, while the second day could be devoted to publications.

Arturo Rodríguez Morató started to speak about the book to be published from material collected during WP3. The possible title for the book is "Cultural valuation in contemporary Europe". The book can be published within the Routledge series on The Sociology and Management of the Arts or within the CRESC: Culture, Economy and the Social series in Routledge. The University of Barcelona (Arturo and Matías) and the University of Bologna (Paolo) will be the book's coeditors, with the team's support from the University of Coimbra. The book's plan reflects exactly the work done in WP3 so that it will be easier to transform the corresponding deliverables into academic publications. Each chapter will be dedicated to comparing pairs of cases, with a maximum number of three authors per institution/case, six authors by chapter. Chapters' abstracts and authors' biographies should be submitted by August 31st. Abstracts should be between 150 and 200 words in length.

So far, no decision has been made about the possibility of including brief introductions at the beginning of chapters. Félix Dupin-Meynard (CNRS) suggested adding common introductions and conclusions for each chapter since case comparisons were built on common analytical frames. Ulrike Meinhof (School of Humanities, University of Southampton) added that, from her experience with large research projects, it is important to decide in advance everyone's role in writing a collective book. To her, it is necessary to have a general introduction in the book and then decide which team leads every chapter, who writes the chapters' introduction and conclusion, or in which order to present contributors' names. She pointed out the importance of younger researchers gaining visibility as main contributors. Regarding these comments, Arturo proposed solving the questions of contributors' names and chapters' content after receiving the abstracts. From this time, and after some exchanges with the authors, the editors will elaborate on a more detailed proposal to be submitted to the publisher by September 15th.

Paolo Ferri (UNIBO) raised some concerns about the timing of publications since the deadline for delivering abstracts for the WP3 book has been added to the deadline for delivering the UNCHARTED book in December 2023. It should be important, thus, to determine priorities in the publication program. Arturo answered by remembering that the UNCHARTED book is not an academic project. In this regard, this book should be ready to deliver without much editing effort. In addition, Arturo insisted that it is unnecessary to finalise the WP3 book before the end of the project. Yet, the most important point is to elaborate a proposal suitable for publishers to sign a contract and show some advances in the publication process.

Then the special issue to be submitted to the Journal of Cultural Economy was addressed. The title of this special issue will be "Configurations of values and dynamics of valuation in the cultural sphere", and the University of Barcelona (Arturo and Matías), UNIBO (Paolo) and Coimbra (Nancy) will be the editors. The deadline for finalising the abstracts and deciding co-authors' names is August 31st. The maximum number of authors per partner is three.

Arturo reminded us that this special issue would be made of articles corresponding to sections of the deliverable D3.10: comparisons between cases investigated by two partners. Therefore, the articles can be elaborated by the corresponding partners in collaboration. The main issue here concerns the cases where a single partner has been in charge of writing the abstract. In these cases, it can be good to include members of the other partner team in charge of investigating the contrasted case study as co-authors. Concerning the article "Disputes around participation", members of the Coimbra University team will be the main authors, while members of CNRS will be co-authors since the two teams can collaborate. In the case of the article "Measuring and imagining the values of culture", based on a comparative study handled by Coimbra and TRI, it was impossible for the two teams to

collaborate due to agenda issues. Therefore, only Coimbra is in charge of this article for the moment. Ola K. Berge from TRI explained that TRI needs more time to consider how much they can participate in elaboration.

Concerning the article "Resistance to the transversal gravitation of economic value", where the proposed co-authors are UNIBO and Goldsmith, the two teams still need to discuss their collaboration. Paolo (UNIBO) reminded us that Victoria Alexander (Goldsmith) had raised two important questions. The first one concerns the article's title, which is not determined yet because the current content of the abstract, made by UNIBO, does not discuss the concept of resistance. The second question is about the very nature of this article: should it be an empirical or a theoretical one? The difficulty here is that the article is drawn from many different cases. These questions should be discussed between UNIBO and Goldsmith during the next few weeks.

Finally, the most critical point addressed during this session was the book from WP2 material "Cultural Values in the cultural sphere: a cross-European comparative perspective" (tentative title) to be published in The Routledge series on The Sociology and Management of the Arts. Editors for this book will be UB (Arturo and Matías) and UPORTO (Joao).

Arturo started to present the structure of the book. The book explores tensions between intrinsic (cultural) and extrinsic (social and economic) values in the cultural sphere. It is based on the findings in D2.7 and the analysis of case studies (D2.2-D2.5). The book is structured into three parts. Each part represents a predominant cultural valuation in different cultural domains: emotions, sensitivity, hedonism, and expressiveness (dominant in the area of cultural participation); artistic excellence (related to cultural production, heritage management, but also cultural administration); and cultural identity (related to heritage management and cultural administration). The book explores value tensions, for example, between Entertainment and Social-Educational values; Aesthetics and Economic values; Artistic excellence and social participation; Identity and Aesthetic values. The book presents our cases (or most of them) extensively and shows to what extent values attributed to culture are context dependent. The book also provides a European perspective.

Arturo raised a first difficulty regarding this book: so far, it is based on too many cases, and some of the proposed pairings do not work well. Thus, we needed to imagine a way in which chapters combine cases. As this task might be too demanding, Victoria Alexander has proposed to give up publishing this book and encouraging partners to develop these case studies into specific articles that could be published independently. These might be based on single case studies rather than existing or novel pairings, which have advantages and disadvantages. The two introductory chapters might stand alone as journal articles.

Another option would be to continue exploring value tensions in different contexts by comparing two cases in each chapter but try to identify more convenient pairings. The pairings might occur more effectively if they also mirror the pairings that took place in the deliverables for WP2. If the comparisons were devised by partners who already worked together on WP2, this might yield empirical chapters, which could be written more quickly. Matías Zarlenga (UB) explained that it is possible to use the emerging values and the main tensions by area (cultural administration, heritage management, cultural production, cultural participation and cultural participation through media). The only disadvantage of this strategy is that this proposal, in some way, would be replicating the WP3 book. Finally, another option would be to base the book on selected single case studies. Matías acknowledged this proposal is more feasible but would involve a selection of cases to be included in the work.

João Teixeira Lopes (UP) emphasised the importance of comparing the case studies and establishing lines of intersection, which constitutes the richness of the UNCHARTED project. Regarding this, the best option would be to compare cases inside the same domains; that is the second solution proposed by the UB team.

Paolo said he prefers the first solution proposed by Victoria Alexander, which is going for freestanding articles. He argues that case studies were achieved long ago and are already used for several communications in scientific events. In addition, several members of the team that have investigated those cases are working now for other universities or will be gone before the beginning of the book publication process. Would another option being chosen, UNIBO would opt for the third option, that is, organising the book around case studies. In this scenario, UNIBO estimates that the case about MUDEC would be the most suitable. Nancy Duxbury Carreiro (University of Coimbra) also agrees with the option of freestanding articles since the team of Coimbra is already working on a paper based on UNCHARTED material. Félix proposes to organise the book around chapters about singe case studies since some of them sometimes reveal strong tensions without necessitating any comparison. If the book entry is the issue of tensions between values, then it is possible that some chapters concern comparisons between case studies while others concern single case studies. In this hypothesis, every chapter could start with an introduction presenting the main tension addressed.

Based on these comments, Arturo acknowledged that some partners could not, for any reason, be involved in the book's writing. For this reason, freestanding articles rather than a collective book seems to be the most realistic. However, since some partners might be interested in other options, it has been asked to everybody to make up their minds and make a final decision in the next few weeks. Antonella Fresa (Promoter) reminded us that every article published with the UNCHARTED material should be sent to her, such as she can update the website section dedicated to publications.

With a few minutes left before the end of the session, a brief discussion started about the UNCHARTED book. Antonella explained that this book would not be a scientific publication but a major part of the communication and dissemination, and it will be aimed at illustrating the results of the project in a more narrative form, something that can be distributed to policymakers, stakeholders, and not only to academic researchers. The book will provide a synthetic presentation of what is being done in the research work packages (WP1, WP2, WP3 and WP4) in the first part. The second part will focus on the work achieved in WP5, where the teams involved are elaborating a direct relationship with the stakeholders on the territory.

To conclude the session, Emmanuel Négrier (CNRS) added that it would be fine to consider proposing one or two special issues from materials collected in WP4, either in a generalist journal about public policies, for instance, the Journal of European Public Policy, or in a journal specialised in cultural policy like the International Journal of Cultural Policy.

## WP4 session: Analysing political intervention and impact

**Chairs:** Julien Audemard, Félix Dupin-Meynard, Emmanuel Négrier – CNRS

*WP4 Strand 1: Report on fieldwork progress and agenda for future analytic work, by Félix Dupin-Meynard – CNRS*

### Presentation of the ongoing work

Félix started by presenting the objectives of Strand 1, its methodological choices and the operational adjustments made by the partners involved, and the progress of the fieldwork carried out to date.

The Strand 1 objectives are "to assess cultural policy coherence of cultural administrations ", providing "a comprehensive analytical view of the cultural policy coherence in relation with the promotion of

the values of culture both in an internal inter-territorial perspective and concerning value configurations in society", contrasting their policy goals and values with their implementation strategies, including the structure of their policy programmes and budgetary allocations, in different European countries and at different territorial levels.

To carry out this comparative analysis, the partners involved (CNRS, UB, TRI) conducted a series of 13 case studies of cultural administrations in 6 countries at three different levels of administration (national, regional, local) and the European level.

In each of these cases, the research distinguishes three levels of decision-making: the policy level, the bureaucracy/ general management level, and the practical implementation "street level". The overall cultural policy analysis is complemented by a detailed analysis of the music sector and its sub-policies and programmes.

The CNRS team then presented the progress of the field survey and its coordination. In April, the partners constructed their common interview guide before launching their fieldwork for each case study (collection of first documentary corpus; interview survey). Several coordination meetings have been organised to review the fieldwork and its difficulties, adjust the methodology (e.g. discussions on lexicometry analysis, comparative budget analysis, the adaptability of the interview guide, or the extension of the interviews to the category of professional sector representatives), discuss the comparative variables and the report structure, and plan the next stages of the work (parallel session in Barcelona to exchange about first comparative results in response to research questions; meeting the June 22nd to validate the report structure and discuss comparative table and value principles clusters; writing of the case reports before the September 10th; two meetings to coordinate the writing of the comparative analysis in September; deliverable in October).

To date, the partners have collected the first corpus of objective documents, and a budget analysis has been made on pilot cases (revealing a difficulty in collecting and comparing exact indicators (with varying nomenclatures and degrees of detail and transparency). They also completed more than half of the planned interviews - the remaining being scheduled before the summer break. Most targets have responded favourably, although some profiles are more difficult to reach than others (cf. elected representatives). The interviewees were curious and showed a strong interest in our questions. Most did not seem to be used to approaching their activity from a values perspective. The interviews were very long (between 1.5 and 2.5 hours), reflecting the interviewees' interest but requiring adjustments in the prioritisation of questions. Several questions or follow-up questions brought out interesting results, for example, reactions about strong tensions between values or strategic choices and public controversies; questions that put the interviewees in a decision-making situation in selection processes, asking them to describe the practical application of the judging criteria; questions about main values change and their factors.

***Partners' complements***

The partners provided additional qualitative remarks on their case studies after this presentation. Several points were raised:

Regarding the Norwegian cases, for which the investigation has just begun, the local actors seem to position themselves concerning the national level, and the values are fairly similar between cases ;

Regarding the Spanish cases, it was noted that music is a policy that is not visible and distinct from the rest. In the case of Galicia, cultural policy is highly integrated with tourism policy.

Regarding the French cases, there is a trend towards an increasing divergence in the values underlying the policies of the State and those of the region and the metropolises; as a global impression, it has been mentioned that values are supposed to be autotelic, separate and conflicting, is in practice always cumulative: the valuation of culture produces aggregations of specific values which are in perpetual reciprocal adjustment.

Regarding the European case, have been mentioned the cohabitation of multiple, difficult-to-hierarchise, not precisely defined values; the singularity of a policy centred on social and economic objectives aligned with political priorities (innovation, green deal, inclusion) heteronomous to culture, rejecting any intrinsic aesthetic value; the current debate about a greater sectoral action adapted to the music industry; indications of a lack of coherence in implementation (relatively small budget and workforce; potential negative effects of calls for projects).

*Advisors' feedback and discussion*

Kate Oakley welcomed the great ambition of the comparative work and the interest of the data already collected in the case selection table (cultural budgets per inhabitant, etc.), which can be very useful for researchers in comparative research on cultural policies. She mentioned the difficulty of revealing contradictions in the official discourse of elected representatives and senior civil servants, pointing out that the most interesting statements are often made 'off the record'. Concerning the music sector, she pointed out the importance of examining the distribution of budgets by aesthetics in light of cultural tastes and practices.

Kate then noted the strong degree of commonality of the cultural policy values, which refers to "centre-left ideas" everywhere; at first glance, the documentation does not show much innovation. She, therefore, asked the research team about the possible emergence of new ideas and new values that would go beyond the apparent consensus, mentioning, in particular, the interest in analyses of the specific cases of Hungary (with potentially more ideological and more coherent values) and Barcelona (with its claim to a political break with "left-wing populism").

The CNRS team replied that it was important to identify values that would be 'innovative' or 'groundbreaking'. It referred to the case of Europe, where values seem to be highly reactive to current events (e.g., calls for projects relating to COVID, Ukraine, etc.) and the contradictions within the combination of values (e.g., ecology and the economy). They then indicated that beyond the apparent consensus on "generic" values, there were, in fact, strong internal contradictions, which research had to reveal (for example, the economy at the service of diversity and independence or the economy at the service of European competitiveness).

Alain Quemin summarised the objectives of Strand 1 and praised the clarity of the methodological documents and the progress of the fieldwork. He then posed some questions: to what extent does the focus on the music sector allow analyses to be generalised if the sector has its specific dynamics? Does limiting the number of interviews per group of players allow for real representativeness? Why not imagine a broader survey using questionnaires? Finally, isn't the strong presence of Mediterranean countries and regions in the sample of cases likely to distort the analysis because of their geopolitical particularities?

The CNRS team replied that generalising to sectors other than music is an excellent question. While this research cannot claim a total generalisation, as it cannot study all sectors, it can identify some major variables that distinguish, or bring together, the music sector and other sectors, whether in terms of value principles, type of governance (e.g. the role entrusted to sectoral agencies, which distinguishes the music sector from that of the visual arts in France), or conditions of implementation

between levels of public action. Concerning the limited number of interviews: more exhaustive information could be gathered, but as far as the objectification of the information drawn from the interviews is concerned, there is a dynamic in the method which allows each interviewee to be considered as a 'control' for all the others. It is then up to the analysis to conclude the consensus and dissensus. As far as the questionnaire method is concerned, it seems very appropriate for more quantitative data. But in this Strand case, we opted for a more qualitative method that could reveal implicit contradictions, for which interviews and case-by-case quantitative data analysis seem preferable.

*WP4 Strand 2: Report on fieldwork progress and agenda for future analytic work, by Julien Audemard – CNRS*

### Presentation of the ongoing work

This session started with a presentation by Julien of the objectives of Strand 2, its methodological choices and the operational adjustments made by the partners involved, and the progress of the fieldwork carried out to date.

The general objective of Strand 2 is to provide a comprehensive analytical view of cultural policy effectiveness and impact in fostering the plurality of values of culture, with a specific focus on cultural diversity, equality, and inclusiveness. The analysis carried out in Strand 2 focuses on eight cultural institutions in Hungary, Italy, Portugal and the United Kingdom. Case studies developed in Strand 2 are based on a qualitative approach in line with the general methodology of the UNCHARTED project but also mobilise quantitative data, when relevant and available, in a mixed-method logic to meet the objectives of the strand.

Assessing the impact of cultural institutions on societal values, that is, beyond the narrow economic aspects, resembles a conundrum. Most previous studies on impact assessment use quantitative methods from economy and auditing comparable to a "toolkit approach". We take the challenge to investigate this topic by focusing on how cultural institutions perceive their impact through a qualitative approach. Strand 2 proposes to address two research questions:

RQ1: To what extent and how do cultural institutions' configurations and action strategies favour cultural diversity, equality, and inclusion?

RQ2: What are the impacts of the interplay between different systems of valuation and evaluation in cultural institutions?

The complementary aspect of Strand 2 as compared with Strand 1 was highlighted. Theoretically, while Strand 1 focuses on implementing cultural policies, Strand 2 investigates the implementation of cultural projects and their impacts in situ. Consequently, from a methodological perspective, while Strand 1 investigates cultural policies from macro and meso perspectives, Strand 1 focuses on micro-level approaches.

Julien then presented the work achieved so far by partners involved in Strand 2 (ELTE, Goldsmith, UNIBO, UP). The CNRS Team reminded us that several meetings had been organised since January 2023 to define the research questions, methods to be used, and cases to be investigated. Strand 2 is currently at a data collection stage, with almost all cases under investigation, around ten interviews already completed, several arranged for the next few weeks, and document analysis already achieved.

The first results underline the importance of equality, equity, and inclusiveness values in the discourses but also acknowledge tensions between actors regarding how these values should be

defined and how they should be measured. The ongoing fieldwork has revealed many evaluation systems across cases, from the most integrated form to the most informal ones.

*Partners' complements*

Joao for The UP Team explains they have been doing two case studies. The first one is PELE, a cultural association using art as a tool for participation, empowerment and social inclusion. It has been working for 15 years and works in many dimensions, like in prisons, doing artistic creation, programing its own place, and training with local communities for developing social competencies. PELE has got very formal processes of evaluation. The Portuguese government supports it through the art direction. These processes are done by external companies or by research centres. At the same time, PELE thinks that they should have different kinds of evaluation. They are unsatisfied with those because they seem very distant and standard. They are now beginning to involve themselves in some ethnographic work and asked the UP team to participate. Currently, the UP team is building a guide for that kind of evaluation with them.

The other institution, SONOSCOPIA, is a cultural association founded in 2011, and it is related to experimental, improvised and electroacoustic music. They also have some education programs but are more focused on the edition than the publication of this graphic material and artistic creation works, exhibitions, sound installations, musical instruments and so on. They do not have very formal evaluations. They are also supported by the art direction and work as an informal network of national and international artists, and they do not develop formalised evaluation processes, and they think it is enough. So UP Team is investigating two very different cases.

Gábor Oláh then presented the cases done by ELTE. ELTE is investigating two cases in Budapest. The first is a community centre in a central district called the Glove Factory. The other one is in a peripheral district, the fourth district, and a community centre, the local Slavic self-government for the Roma community. The cases present some similarities as well. The target groups are very similar because they are disadvantaged social groups, for instance, Roma children. The second institution is creating activities for Roma and non-Roma children. ELTE is now struggling to figure out how to analyse the data because these institutions do not have any kind if formalised evaluation. Three interviews have already been done, one with the vice mayor for cultural Affairs and one with the leader of Glove Factory. Eszter Gyorgy (ELTE) added some complements about ELTE case studies. In both cases, the values we are looking for are very clearly in the strategic documents. There is an emphasis on inclusion and the integration of the Roma community within the broader community.

The floor was given to Cecilia Sosa (Goldsmith) to present the fieldwork undertaken by the Goldsmith team. Goldsmith has chosen to focus on two arts organisations in London because of the construction of public funding in this city. All the organisations that are part of the national portfolio need to report officially on equality, diversity and inclusion (EDI). So, Goldsmith is dealing with institutions that have already reported on that, that have this so much into their minds. The first case study is Gasworks, a small-size contemporary arts organisation in London. Gasworks is situated in a very not particularly wealthy area in London, and they have a lot of immigrants around. Many of them come from Latin America and organise things that are not exactly associated with art, for instance, free English classes for immigrants, plus community projects involving artists. Cecilia has conducted the first two interviews with the director and co-director of Gasworks is how the institutions perceive this normative impulse for EDI values. Two more interviews are arranged, one with a curator and one with a member of the advisory board.

Goldsmith team will also follow up the selection process of community artists over the summer. The first results of the analysis show that the Gasworks team is fighting against the templates of evaluation and questionnaires implemented by public officials. They feel stranded by numbers, and they fear becoming statistics. There is here an interesting contrast about valuation and evaluation.

The floor was given to Paolo for the UNIBO Team. The first case investigated by the UNIBO team is MUDEC, which they have analysed in WP2 and WP3. The second case is the Austrian pavilion at the Venice Biennale. UNIBO uses the cases as the units of analysis but selects initiatives to study within each case. UNIBO is analysing initiatives aiming at diversity, inclusiveness and equity. UNIBO is operationalising each of these values in a specific way. For instance, about inclusiveness, they look at the audience and how it is involved. About equity, they look at pricing. About diversity, they look at the thematic developed in each initiative.

The first results produced by the UNIBO team show tensions and differences between how actors interpret inclusiveness, diversity, and equity. Private actors consider themselves inclusive because they target a diversity of audiences. At the same time, the public actors consider the exhibitions very bad in equity because the pricing is very high. The results in terms of evaluation are similar. Public actors focus on revenues and profit when discussing impacts, while public actors deal more with diversity or inclusiveness.

*Advisors' feedback and discussion*

First, Ulrike wanted to thank the participants for allowing her to read and comment on the working document. She is impressed by the work that is going on both in S1 and S2. Her first question is how to compare so many evaluation systems ranging from highly informal to highly formal ones. The sample consists of three informal systems (The two Hungarian cases and the SONOSCOPIA case in Portugal) and three formal ones, where the PELE case in Portugal displays highly integrated evaluations. Here the second remark is about the method. The proposed approach consists in looking at self-assessment. However, nowadays, everybody respects equality, diversity, and inclusiveness. Therefore, The question is how to objectify how these institutions integrate these values into their actions. This point meets the previous comment about comparability. In the case of formal evaluation systems, it is possible to rely on mission statements or reports. But, in the case of informal evaluation systems, the only way is to rely on informal, declarative data. One way to ensure comparability is to produce a common analytical – critical (?) – framework, asking, for instance, the same sort of questions across all the cases during the interviews. Finally, her last remark answers the question of sensitivity highlighted by Goldsmith. If the question of sensitivity should not be put on aside, Ulrike reminds us not to overate the impact of academic research and advises us not to worry too much about the impact of this research on the investigated institutions. She also emphasises the great interest in this work at a time of great political shifts. She wonders, particularly in the case of Hungary, to what extent are the projects that partners are analysing provocative ones? From this comment, Ulrike finally underlines the importance of considering the national political context in the analysis.

Michael's first question concerns the place of the artistic focus in the different cases. His second remark is about the idea of the interplay between evaluation and valuation. According to him, only one project, the Gasworks case investigated by Goldsmith, mentions this interplay while the others do not. Michael found exciting the approach of concentrating the analysis on the perceptions of evaluation produced by the project leaders. However, a second level of analysis is needed here, where teams should look at the evaluation procedures' impact on institutions. Is it self-serving, or is it a constraint? Michael then added short comments on the cases.

Regarding the Hungarian cases, Michael considers that informality in the evaluation is not a real problem. It only challenges the ELTE team to look more closely at the kind of words that are being used and the meanings of those terms as they are being used. Also, it means trying to clarify the kind of emotional value behind using certain terms and not using others. For Michael, we can hypothesise that this point varies between countries; there is always a tradition and heritage to using certain terms in certain fields.

Michael found the UNIBO cases interesting because the directly put tensions between many definitions of equality, diversity, and inclusiveness. The PELE case in Portugal also seems very interesting because of the existing evaluation practices that allow for a critical perspective. It is also interesting because it is the only case where leaders explicitly state that art is a toolkit. The question here, and more generally for the whole strand, is to clarify the cases. Are we talking about toolkits, or are we talking about artistic projects which also have inclusiveness effects and so forth? Since the UP team will be engaged with PELE in a critical debate around evaluation, several questions should be addressed. How close can the UP team get to that now? What does that consist of? What are the points being mentioned? What is contested? Always regarding cases investigated by UP, through the SONOSCOPIA case, one can be uncertain about the difference between an activity report and an evaluation. Finally, Michael would like to hear more about the Gasworks case's hub in the Triangle Network. Triangle is a fantastic program for African arts, which plays another role there.

Because the time for this session was over, it was decided to postpone the partners' answers to advisors to the parallel sessions.

## WP4 Parallel sessions per strand

**Chairs:** Julien Audemard, Félix Dupin-Meynard, Emmanuel Négrier – CNRS

*Strand 1: Cultural administrations, by Félix Dupin-Meynard and Emmanuel Négrier – CNRS*

In this session, Strand 1 partners shared their initial results from their case studies fieldwork. They began to elaborate and debate their comparative perspectives through 3 major research axis: the definition of values, the coherence of implementation, and the analysis of governance and social accuracy.

### Defining values: hierarchy, tensions and evolution factors

The partners mentioned several observations from their surveys.

In Barcelona, there has been a major transformation in the discourse: the emergence of "community action", the move towards greater transversality, the emergence of cultural rights and the notion of citizenship, etc., as well as a tension between support for the creative industries and policies to combat the precariousness of the artistic professions in terms of workers' rights.

In Hungary, the values of nationalism, identity, corporatism, top-down management, and participation are observed.

In Galicia, the values of nation-building through identity and traditional music are observed, partly in tension with an economic approach.

In Norway, a loss of contact with grassroots organisations has been noted, due to the greater professionalisation of the beneficiaries of cultural policies, by the dominance of aesthetic quality values, assessed by "competence" and seeking to focus on the best artists. This movement also implies a concentration of funding in the capital to the detriment of the territories.

In France, there is an increasingly strong differentiation between the values advocated by the Ministry of Culture and local cultural policies -. In contrast, the State prioritises aesthetic value, negotiated with territorial and social values, local administrations seem to prioritise social and territorial values. In the music sector, the objectives and values are relatively implicit, if not absent.

In the case of Creative Europe's culture programme, the values are numerous, often undefined and difficult to prioritise. The absence of any aesthetic value characterises them; the priority is given to the political objectives defined by the Commission (competitiveness, innovation, mobility, sustainability, inclusion, gender equality, etc.). The term "diversity" is very present but difficult to define. The values linked to circulation, mobility and the economy are in tension with sustainability.

A discussion ensued, particularly on the methods of lexicometry analysis of official documents and the need to define and map the different dimensions of a single value. As raised by Kate and Félix, a value such as 'diversity' can mean very different things: in the UK, it refers to ethnic diversity and diversity of origin; within the EU, it refers to the protection of and respect for national and local heritage... but in both cases, it may primarily concern the professional arts sector, or the cultural public, or both, and prioritise the types of diversity to which it refers. The partners agreed on the need to build clusters of value principles that show the same value principle's different dimensions and internal contradictions.

***Measuring implementation coherence: budgets, strategies, criteria***

The partners reaffirmed the need to share their budget interpretations; it will not be possible to standardise all the information, but sharing will make it possible to compare major trends by pooling a group of basic indicators.

The discussion focused on the link between values and implementation and the need to look at specific values, describe their contextual definitions, and interpret how they are embodied in instruments, strategies, budgets and actions. Several examples were cited: the French Ministry of Culture's "Culture Pass", which is a demand and market-oriented instrument that favours mainstream industrial players; the case of a Barcelona opera produced with underprivileged young people, but which, despite its claim to break with the past, remains fairly close to the classical values of democratisation.

The partners then mentioned the difficulty of comparing the different materials collected in each case. One suggestion was to carry out an analysis by value by gathering clusters of clues that could testify to the coherence of the implementation.

Several other points were raised: the need to observe what cultural policy does not fund or consider (sectors, aesthetics, excluded players). The importance of procedures and organisational dynamics was mentioned on this subject, which can have exclusionary effects for certain categories of actors. For example, European calls for projects may involve a high degree of administrative complexity, knowledge and skills to succeed in the selection process, excluding little grassroots organisations and favouring medium and big size organisations receiving national public funding. These selection effects may conflict with the objective of diversity (majority presence of classic, contemporary and opera aesthetics) or with the objective of innovation or local inclusion. More generally, the importance of

analysing the selection procedures was discussed, and in particular, the profile of the juries (their socio-cultural profiles, potential conflicts of interest), the criteria used (mastery of a specific vocabulary, weighting of contradictory criteria, etc.), and so on.

The question of delegation and arm's length was also raised: this principle includes very different effects (to whom is selection delegated? according to what criteria? with what level of autonomy?). Finally, the impact assessment of instruments and funding was discussed: what are the long-term effects of subsidies? Are there any real evaluations of the short-, medium- and long-term impact of cultural policies?

*Governance and social accuracy: debate, conflicts and negotiation with civil society and professional field*

Several partners mentioned how cultural administrations are setting up mechanisms for governance, negotiation with stakeholders and citizen participation. In several cases, we observe a limitation of democratic governance, restricted to short dialogues with a few professional stakeholders. There is no permanent arena for discussing cultural or music policy most of the time. While there are forms of consultation before major decisions are taken, these are more often negotiations between divergent interests than democratic participation. The partners agreed on the importance of observing and analysing these consultation forms and their impact on developing values and strategies.

There was a discussion on the impact of social or professional disputes. The example of the implementation of 'Music Moves Europe' was cited - this programme was the result of a proposal by the European Parliament, after powerful lobbying by several professional networks in the European music sector - but the players remain disappointed by the lack of ambition of the final programme and the absence of a procedure for ongoing discussion with the professionals. The partners discussed the difficulty of proving to what extent the emergence of new values such as gender equality or ecology are linked to social protest; it can be hypothesised that the feminist and environmental movements have influenced this development, but it is complex to analyse precisely how social trends influence administrations. Kate mentioned the value of observing changes due to high-profile controversies or challenges, based on concrete examples, which make it possible to establish a link between administrative change and social demands.

*Calendar and comparison strategy*

In the remaining time, the partners agreed on a timetable to validate the report's structure (case studies and comparative section) and coordinate the comparative analysis in September.

*Strand 2: Cultural institutions, by Julien Audemard – CNRS – and João Teixeira Lopes – University of Porto*

The session starts with Julien reminding that Joao has accepted to play the coordinator role in this strand to facilitate and improve the communication between the leading partner and partners

involved in the case studies. At the beginning of the session, Cecilia has accepted to take notes about the ongoing discussions and to present a summary of the exchanges during the wrap-up session.

The initial program of the session has been a little bit disrupted because partners did not have enough time to react to advisors' feedback in the WP4 Strand 2 session. Instead of discussing the partners' findings about our research questions directly, Julien proposes to take some time to engage in discussion with Michael and Ulrike, following their previous comments.

Paulo wants to shed some light on several cues proposed by Michael and Ulrike to build a comparative analysis across the cases. The first one is the possible division of the work into two steps: self-assessment analysis, then assessing what other actors say about institutions' self-assessment. However, about this point, Paulo reminds Victoria Alexander's concern about the sensitivity of judging institutions in the search for funding. The second clue was suggested by Michael when he proposed to investigate the degree of involvement of the esthetic dimensions across cases.

Joao thinks it will not be possible to measure impacts but only perceptions of impacts since we are only getting superficial access to their evaluations. Regarding this, Joao proposes not to consider the impact anymore. Furthermore, he thinks the opposition between the informal and formal evaluation processes could be another comparison axis. As Paolo said, a second comparison axis can be the intrinsic uses of art versus the uses of art as a toolkit. The third axis can be the timeline for evaluation processes: are they ex-ante or ex-post? A fourth axis can be about who carries the evaluation: is it the institution itself (self-evaluation), another institution (external evaluation), or a mix? A last axis of comparison can be the degree of involvement of populations in the evaluation process. For instance, PELE often involves populations, even with ethical and participative concerns. In this last phase, they are doing ethnographic work. They do not trust more research centres because they think their evaluation is too superficial.

Gábor Oláh agrees on the usefulness of these axes, adding that the targeted groups might be another axis of comparison. Gábor Oláh also agrees with Joao's comment about the impossibility of working directly on impacts. In the case of the two Budapest institutions, evaluating impacts would be challenging because the target populations are children, which implies a lot of ethical issues. Regarding Michael's comment about analysing words used by institutions, Gábor Oláh thinks the ELTE team has access to sources allowing such analysis.

Cecilia said she found her remark of Ulrike about the distribution of funding in England fascinating. How it has been decided to go into a more federal program directly affects Gasworks, which criticises the lack of distribution. Cecilia considers that Michael's point about integrating the intimate aspects of the narratives produced by institutions is at the heart of our research. She feels that the interviews say a lot about what is hidden, the context, the aims and goals of the organisation and all silent things that circulate. She thinks that a strategy to avoid judgment about institutions would be doing the intellectual assessment without being judgmental. Cecilia also wanted to say more about Goldsmiths' case study number two. Goldsmiths are hoping to investigate a bigger arts organisation, a contemporary arts organisation in Nottingham, in order to have a comparison between two different sizes and also in terms of cities. Cecilia is currently dealing with the director of this institution to have their agreement. The process is difficult because of the mistrust toward academics and officials in the art sector. Eventually, Cecilia suggested that it would be interesting if we could agree on some common ways of data collection that could make the case studies more comparable. One possibility would be, for instance, to share the questionnaires that we use to interview stakeholders within organisations.

Michael wanted to add a few remarks on the case of the Australian pavilion at the Biennale.  Do they always do projects that raise controversy, or is it a coincidence that it raises controversy in your case? Michael also likes the idea raised by Cecilia of sharing analytical tools, especially successful tools sharing successful tools to see if others can benefit from that to the same extent. It could be a way of strengthening the connections between the cases.

Ulrike goes in the same direction, recalling that developing a joint toolkit is the starting point of every research. At this stage, it might be too late to develop this toolkit, but it is still possible to integrate common questions about how people define values since one of the most exciting results that the UNCARTED project has produced so far is to demonstrate the lack of agreement about what people think, says they are doing, and do actually. Regarding Goldsmiths' issues with selecting its second case study, Ulrike recommends returning to one of the previous projects the team has done in previous WPs. One interesting thing with this strategy would be to find out how the institution has evolved since then.

Several partners consider that the common toolkit approach cannot be an option anymore. Joao pointed out that the interviews for the two Portuguese cases were already done. Paolo added that in UNIBO cases, the approach has consisted of analysing what institutions are doing by looking at documents and doing interviews. Paolo also raised some concern about asking people their definition of values directly, which can be naïve in some way. Joao insisted on the importance of being flexible in our approach to case studies, like in the case of PELE, where the UP team has been unexpectedly involved in elaborating a new evaluation framework.

The final lines of discussion concerned the writing of deliverable D4.4. The decision has been made to produce the first reports on each case before the summer, such as every partner has the opportunity to read them and discuss the deliverable structure and axes of comparison based on concrete material. These reports should be around 3500 and 4000 words in length. The structure for these reports should follow a simple plan: 1) Introduction, 2) Method, 3) RQ1 findings, and 4) RQ2 findings. Everyone has agreed on the idea proposed by Michael to rephrase RQ2 since the concept of interplay is too confusing. RQ2 will be rephrased to explain how institutions perceive their impacts regarding the values they are trying to implement.


*WP4 wrap-up and general discussion, by Emmanuel Négrier – CNRS – Cécilia Sosa – Goldsmiths, University of London*


Cecilia started to present the discussions in the parallel session dedicated to strand 2. The discussions were very constructive and helped prepare for the final report's writing. More precisely, the question of finding comparative axes across cases has been discussed. Five main axes have been identified: 1) formal versus informal evaluation processes; 2) intrinsic uses of art versus uses of art as a toolkit; 3) ex-ante versus ex-post evaluation; 4) self-evaluation versus external evaluation versus mixed evaluation; 5) the degree of involvement of populations in the evaluation process. Regarding RQ2, the decision has been made to focus on how institutions perceive their impact, and the research question has been rephrased accordingly. Regarding RQ1, the idea was to focus on how institutions define culture's values, insisting both on the richness of words and the diversity of definitions that emerge from one institution, one context, to another.

A large part of the discussions has concerned the idea of building a common toolkit to be shared by partners to ensure comparability and highlight the differences between cases. This proposition was not fully adopted regarding the degree of advancement of some case studies. Rather, It has been decided to proceed from a common theoretical frame based on the research questions defined in the previous meetings.

Eventually, partners involved in strand 2 have decided to produce reports (around 3500 and 4000 words) on case studies before the end of July. Based on these reports, strand 2 partners will be able

to define the structure of the deliverable D4.4 in early September. From this point, Félix has insisted on building a precise structure for the reports to make the comparison easier.

Then Emmanuel presented the discussions of the strand 1 parallel session. These discussions were organised around four points. First, the definition of values that are analysed. So far, case studies have demonstrated that tensions are plural between values and within the same value. Regarding this point, partners have agreed to build value clusters, including divergent definitions of related concepts. Discussions have also raised the necessity to assess value gaps between government levels and the alignment changes between levels. These changes should be assessed according to external factors but also according to internal factors such as political trends or territorial pressures.

The second point was about measuring the coherence in terms of implementation. Partners made the decision not to make a comparative budget analysis. Rather, the idea is to share a common interpretation of the way through which values are supported in financial terms. It is also important to learn about the consequences of context in changing the hierarchy of values. To assess that, we shared the idea of taking concrete examples of values conflicts inside policy procedures and instruments (for instance, inclusion/exclusion of stakeholders and values).

The third point was about governance and social accuracy. We share the idea of measuring the degree of participative procedures inside the policy process, the participation and forms of concertation between collective interests and policy authorities, and the relationship between cultural policy and social movements (gender, sustainability, cultural diversity, etc.).

The fourth and last point discussed was the report structure and comparative indicators. We agreed on three steps: a) June 22nd: validation of the report structure; b) September 15th: case studies reports are sent to all partners and begin comparative analysis; c) End of October: WP4 deliverable Strand 1.

After Emmanuel's speak, Paolo invited strand 1 partners to check D3.10 and the related discussions on economic value. TRI team asked about the difficulty of building a comparative frame before the summer. Regarding this point, the CNRS team will propose a framework in the next few days. Félix eventually insisted on the common aim for the two strands of WP4: to discuss the notion of expected impacts and to make a value concrete through what it is expected to produce or transform.


## Roadmap for cultural policy action and third policy brief

**Chairs:** Antonella Fresa – Promoter S.r.l – Emmanuel Négrier – CNRS – and Arturo Rodríguez Morató – Universitat de Barcelona

The roadmap and the third policy brief are the last policy-oriented deliverables of our project. They should provide useful guidelines for policy action that we can deduct from the analytical work we have done throughout the project.

First, concerning the road map, Arturo recalled that the road map is defined in general terms in the grant agreement, saying that there should be a general reflection on the cultural policy models that can best favour the promotion and full exploitation of the societal value of culture. In this respect, this deliverable should incorporate recommendations regarding measuring the plurality of cultural values in statistical information and quantitative data, as well as proposals for improving the assessment and evaluation systems that govern administrations and cultural institutions. It does not mean specifically to produce recommendations to go exactly in one direction or make some connection, but just

providing a certain configuration of possibilities. So, on the one hand, this road map describes possible connections between institutional and administrative models, evaluation systems, policy outcomes and effects in terms of the plurality of values. It should be done from all the analysis accumulated throughout the project, particularly concerning WP4. Recommendations will not be limited to the European level but can address issues specific to national or local levels.

Cecilia suggested that, since the results accumulated throughout the project concern case studies that are not always comparable, recommendations to be included in the roadmap can take the form of a straightforward list of bullet points or friendly recommendations that could emerge from each case. Paolo agrees with this idea of starting from the cases, providing policy implications at the case study level, and trying to cluster and generalise from there.

Antonella then presented the third policy brief, a deliverable foreseen in the grant agreement as part of the WP6 "Communication and Dissemination". It is intended to extrapolate from the previous work package elements that would be useful to draft recommendations for policy makers. The policy brief is proposed to focus on the results of WP5, translating the outcomes of the work done in axes 1, 2 and 3 from the research domain to the domain of its deployment. In addition to the recommendations that emerged from WP5, the third policy brief will include a reflection on the outcomes from the concertation meeting organised by the European Commission on June 21st, with the participation of UNCHARTED and its sister projects INVENT and MESOC. Following all the deliverables from WP5, the draft of the policy brief is foreseen to be ready before Christmas 2023 to be circulated among the partners for feedback.

Arturo added that this third policy brief should complement the roadmap, focusing on cultural strategic planning and culture-led urban regeneration, mostly relying on our elaborations in WP5 Axis 1 and 2 (but also in connection with some other work done along the project).

# Friday, June 16<sup>th,</sup> sessions

## Session 1: UNCHARTED experimental demonstrations in three axes of reflection and intervention

**Chairs:** Gábor Oláh and Gábor Sonkoly – Eötvös Loránd University

The session began with an introduction by Matías Zarlenga (University of Barcelona), who presented the programme and technical information for the day.

*Lead partner report, by Eszter György, Gábor Oláh and Gábor Sonkoly – Eötvös Loránd University*

Gábor Sonkoly, as WP5 leader, welcomed the workshop participants and briefly presented the WP and the workshop objectives. He reminded us that the WP5 is in its third implementation phase, which started in February 2023 at the London Central event and will last until November 2023. As they reached the middle of the phase, he suggested they first look at what had happened at the WP level in general and then the next steps.

Gábor Oláh presented the activities of the third implementation phase of WP5 so far and its integration into the WP workflow plan, particularly, WP coordination and calendar. He reminded us of the D5.2. deliverable (Action Plan) was submitted at the end of February 2023, which includes concrete methodologies, timelines and action plans by axes and main cases. This deliverable also includes internal protocols completed by the partners to strengthen the continuous assessment aspect of WP5. Therefore, the first step in the continuous assessment was the protocol to create common vocabulary and indicators. Gábor mentioned the WP leader's commitment to attend a stakeholder event organised by the main case leaders before the 2nd UNCHARTED workshop. As part of this, Gábor Sonkoly visited Barcelona in March (Axis 2), Gábor Oláh visited Porto in May (Axis 3), and Eszter György joined a workshop online with stakeholders in Volterra in June (Axis 1). These on-site experiences, complemented by the Barcelona workshop, provide a basis for the second mid-term assessment phase. It will be followed up by a third and final assessment, which the partners in the framework of an updated protocol will provide.

Afterwards, Gábor Sonkoly presented the plans for the remaining 5-6 months of WP5 by specifying four main tasks that should be discussed at the workshop:

1. The integrated organisation of stakeholder workshops by main cases held at the end of the implementation phase (M44-45, September-October 2023);
2. D5.3 Deliverable: Assessment report (M46, November 2023);
3. Policy seminar in Budapest (M47, December 2023);
4. D6.11 Deliverable: UNCHARTED Book (M48, January 2024).


*Report on Axis 1 - Cultural strategic planning, by Antonella Fresa – Promoter S.r.l.*


Antonella Fresa as leader of Axis 1 and main case 1.1, was invited to take the floor. Antonella summarised the progress made in recent months concerning the main case, 'Cultural strategic planning of Volterra'. She started her presentation with the action plan included in the D5.2 deliverable, of which several elements have already been completed in the first half of the implementation phase: desk research, 15 semi-structured interviews with local stakeholders, meeting with WP Leader and local authority (June 13th 2023). In terms of field work, the implementation phase is divided into three steps: 1. survey on territory (March-June 2023); 2., Complementary interviews, first result presentation to WP5 Leader, development of the bilingual publication (July-September 2023); 3., Public event in Volterra (October 30th 2023). This public event will also be important as an opportunity for stakeholders and the public to learn about the results of the experimental case and the next steps after the project is completed.

She then talked in more detail about the 15 interviews already carried out with politicians, officials, tour operators, gallery owners, museum directors, members of local associations, and traders, which have been the initial part of the survey on the territory. The interviews allowed for a qualitative analysis and the collection of stakeholders' contributions, ideas and reflections.

The results of the first analysis of the interviews were discussed with stakeholders at the Volterra Town Hall with the participation of the axis and the WP leader (Eszter György, ELTE) on June 13th 2023. At this event, participants agreed on the second round of interviews, reviewed the questionnaire's content, defined the content of the bilingual publication and set the objectives and scope for the public event at the end of October. Antonella then spoke in more detail about the widely distributed questionnaire. The questionnaire, which includes five multiple-choice questions, will take

around three minutes to complete, will be launched at the end of June and will target the inhabitants of Volterra and those planning to visit Volterra. Invitations to respond to the questionnaire will be sent via email distribution lists, press releases, social media channels, and websites.

Antonella then gave an insight into the results of the first round of interviews. The interviews have been grouped into three main thematic sections: 1. general considerations on the municipality's cultural strategy, policy and investment in culture; 2. identification of cultural, social and economic impacts and effects on the development of the territory; 3., future of strategic cultural planning. Antonella noted that the interviewees had seen Volterra's strategic cultural planning as a multiscale process (local, regional, national, interinstitutional) with an 'organic vision of territory' and as a laboratory for innovation of participatory methodologies and co-creation tools. In terms of impacts and effects, interviewees' responses have been clustered around the themes of communication and tourism (more visibility and quality), investment (redistribution of resources and major infrastructure), commerce and business (art as a resource for the territory), social aspects (youth empowerment), policy (shared administration experiment). As regards the post-UNCHARTED prospectives, the respondents considered that permanent coordination among stakeholders should be established.

*Report on Axis 2 - Culture-led urban regeneration, by Mariano Martín Zamorano – University of Barcelona*

Mariano Martín Zamorano, as leader of Axis 2, briefly summarised the main case, which focuses on a cultural programme, Fàbriques de Creació (FC) and covers the fields of heritage management and cultural administration. UB collaborates with the Institute of Culture of Barcelona (ICUB), three representatives participating in the workshop. He reminded us that this cultural project had already been dealt with in previous WPs. He underlined that a methodological strategy was built to implement WP5 co-creative approach, which is divided into three successive phases: 1) Meta-analysis of the evaluation experience of the FC, 2013-2023 (February-June 2023); 2) Focus groups, co-creative exploration of the evaluative experiences of the stakeholders directly or indirectly linked to four selected factories; 3) Assembling the evaluations, starting from relating the evaluation processes carried out by the ICUB, other assessments and the experiences of the urban cultural regeneration policies of Porto and Budapest.

He then went into more detail about the result of the first documentary phase, the meta-analysis. It includes ICUB's efforts to use participatory techniques to create effective evaluations. He gave an insight into the programme's history, which goes back 15 years. As of 2023, the program includes 11 renewed industrial buildings in six neighbourhoods. These buildings are municipality-owned, but with a transfer of use, most are managed by non-lucrative private actors (i.e., Foundations, Associations). Co-management is achieved through public-private cooperation agreements providing them relative autonomy concerning programming and management. The factories receive between 20-50% public funding, which is lower than the first generation of cultural facilities. He then shared some experiences and first-round results on the territorial inscription, as the relationship between each factory and its surroundings and contexts differ considerably.

The main focus of the case is on evaluation strategy. Three main elements can define the overall development of the evaluation system for the FC program: 1) achieving consensual evaluation schemes among the ICUB and Factories' actors; 2) involvement of external actors (consultancy

companies and University researchers); 3) building quantitative model initially and a qualitative one after. The evolution of its evaluation model can be divided into four phases:

1. Inception and first quantitative model: conducted by a consulting company, with the participation of ICUB and Factories (2012-2014);
2. Development of the qualitative model (2015-2016): conducted by a consulting company, with the participation of ICUB and Factories still ongoing but no qualitative report on activities so far;
3. Mesura de Govern evaluation redesign (2017): mixed data collecting but not finalised;
4. Development of mixed methodology (2018-2020): supported by university researchers, participatory elements, mixed model, not implemented.

These included transversal indicators for each factory and individual indicators per factory. These model experiments were repeatedly oriented to tensions on institutional autonomies of the Factories and program-level standardisation. So, at the current state, a quantitative model is available and is being revised by the ICUB. The UB will help systematise and compare the experience gained so that the ICUB can use it as a basis for further developing the model. As a preliminary conclusion, Mariano explained that policy change on evaluation policy consecration had serious impacts on the interruption/failure of the remodelling projects. Furthermore, a lack of specific enforcing instruments can be observed to establish agreements between the public and the private sector (i.e. contract-program).

There is a strong need for a combination of updated quantitative indicators with simplified qualitative ones, working at both transversal and Factory specific levels. Following the meta-analysis, the main case will be validation activities, including focus groups in four selected Factories. The main goal is to contrast and discuss strategies, best practices and value mitigation tools for building evaluation models. In addition, they will seek to draw on the experience of control cases, which will be implemented along cross-cutting topics (governance: top-down and bottom-up developments, representation of value plurality, territorial inscription) by examining the cultural policies of the municipality of the 8th district of Budapest (control case 2.2 led by ELTE) and Casa da Música and Cinema Batalha in Porto (control case 2.3 by UPorto).

*Report on Axis 3 - Cultural information systems, by João Teixeira Lopes – University of Porto)*

The leader of Axis 3, João Teixeira Lopes, took the floor. He reminded the audience of the main objectives of Axis 3 on cultural information systems. Joao highlighted the criteria expected of cultural information systems as the fundamental bases of democratic cultural policies: a systematic approach in their construction and application, transparency in their use, comparability in the European context, and adequacy to the singularity of cultural phenomena and values. He continued his presentation with the interaction scheme between the main (3.1 by UPorto) and control cases (3.2 By CNRS and 3.3 by UNIBO), which will be further developed in the afternoon parallel session. He briefly presented the control cases regarding how they can contribute to developing the main case co-creative experimental demonstration. The CNRS-led control case 3.2 studies the DEPS-DOC (Department of Studies, Forecasting, Statistics, and Documentation) French system. Major advantages of this system are that it allows 1) comparing data series over time, in particular for cohort studies, surveys on public funding of culture, surveys on French cultural practices, on the economic weight of culture, on household cultural spending; 2) harmonising data with other national or international organisations (I.e. INSEE, Eurostat); 3) setting correspondence between national and territorial data systems. The UNIBO-led

control case 3.3 studies National Museum System and museum accreditation in the Emilia-Romagna region. As major advantages of the regional system, João points out: 1) fostering transparency and comparability among museums; 2) indicators as self-regulatory/disciplinary devices for those responsible for managing cultural activities; 3) establishing scores and quality standards of museums in Italy. Both cases have a strong quantitative focus, but their level of detail can still be important in developing the Portuguese case.

He then moved to the report on the main case, the Portuguese cultural information system. He described its main objectives: improve an existing statistical tool on adult education and training; build a set of principles and recommendations to integrate the requirements of cultural institutions. He introduced the main case report by presenting the state of the art of the Portuguese cultural information system. He listed three primary sources of information production on cultural activity: the statistical apparatus (e.g. Eurostat, INE, PORDATA), academic research (localised studies, e.g. Pais, Magalhães and Antunes, 2022), and studies carried out by independent organisations in the cultural and artistic field (bottom-up approach, e.g. O Gerador). There is a growing need for in-depth knowledge about the impact of culture on individual representations. In addition to the classical indicators, it is important to cross them with five essential dimensions: 1) Education, 2) Financial Situation, 3) Well-being, 4) Cultural Offer, and 5) Information. Likewise, an attempt is always made to ascertain the reasons for non-appetence and lack of adherence to cultural activities.

João then summarised what remains to be done in the implementation phase. Based on the workshops organised so far, indicators have been gathered that are not included in the current system: number, typology, and location of independent bookshops, their turnover; the weight of children's and youth literature in the book market; everything that happens after the moment of cultural practice (significant appropriations, conversations, sociabilities, and itineraries after the end of the event); informal cultural circuits; non-public (motivations for the absence of membership); leisure practices; circulation of shows and the importance of decentralisation; results of public investment in culture; uniqueness of audiences by an institution and artistic genre; uniqueness of cultural audiences by comparison with the universe of the Portuguese population, etc. Several workshop participants referred to the absence of studies on cultural reception, the need for deeper knowledge on the dimensions of the "new economy of attention" (dispersion, fragmentation, lack of concentration, overstimulation, atomisation of experience), the necessity of holistic research that relate culture to well-being and mental health. In order to carry out more effective and accurate research on cultural attitudes and activities and address the over-centralisation of national cultural policy, several speakers suggested to create of regional culture observatories which serve as an institutionalised platform between academia, the Ministry of Culture (and its decentralised bodies), and representatives of cultural organisations.


### *Discussion*

Gábor Sonkoly (ELTE) thanked all three speakers for their presentations. He noted that the initially established protocol is dynamic because the complexity of each case should be respected, and they must enjoy as much autonomy as possible while also thinking about synthesising aspects. Then he asked the invited stakeholders to comment on the axis/main case reports.

Rosa Gibert Pibernat, Eva Soria Puig, and Montserrat Tort Bardolet (invited stakeholders, Axis 2, Institute of Culture of Barcelona, ICUB) expressed the importance of collaborating with the UNCHARTED project, which they see as an opportunity. They highlighted the singularity of the

Fàbriques de Creació (FC), a network of 11 sites. It is not easy to have visibility of other European initiatives. There are also significant former factory buildings with artistic and cultural functions at the international level, but they are not organised in a network, which is the specificity of FC. Mariano Martín Zamorano (UB) added that one option was to look at what evaluation models for art factories exist in Europe. He noted that it is not easy to contact them. The representatives of ICUB continued: their objective is to develop a system for this network that allows for joint evaluation while maintaining the autonomy and specificity of each. It is not only the unique network but also the way it is evaluated as a network of diverse art forms. The challenge for the ICUB is to take a step back and evaluate the extent to which the cultural policy of the municipality is being implemented. They were very inspired by the case of the Portuguese information system (main case 3.1) because ICUB also did a questionnaire on cultural rights. Cultural rights are not recognised as fundamental in European or international charters. In particular, access to culture is highlighted. This aspect is challenging to measure, evaluate and associate indicators. Gábor Sonkoly (ELTE) noted that despite international documents on cultural rights, these had not been ratified. He expressed that updating the UNCHARTED protocol in the autumn with a section on cultural rights would be necessary. There are often challenges in putting cultural rights into practice, which arise primarily for minorities. In contrast, this issue is also important for other sections of society, which are usually taken for granted. For example, in the case of the 8th district of Budapest (control case 2.2, led by ELTE), it can be observed that the Roma people's political rights are coupled with cultural rights.

Francesco Zollo (invited stakeholder, Axis 1, European Youth Forum) confirmed that cultural access is also very important in the Volterra case (main case 1.1) and their NGO. It is worth noting that the cultural offer in Volterra is impressive, but it is also important to point out that curiosity and receptiveness to new cultural forms are not very high. One of the most significant impacts of the cooperation in Volterra is that they can project how they imagine the town in the future in ten and twenty years. They value the historical background and the cultural realities. The UNCHARTED project allows exploiting improvement capacities. An important element of cultural strategic planning is measuring the impact of each event and activity, and Promoter S.r.l. is a great support in this. It is critical because a small town like Volterra does not have the resources to carry out such measurements. He pointed out civil servants who work overtime and are underpaid in a small city with many cultural heritages to manage.

Vera Borges (invited stakeholder, Axis 3, CIES-Iscte, University Institute of Lisbon) noted that cooperation with the University of Porto is beneficial, among other things, because they need qualitative data. She highlighted that, like in the case of the first national survey on cultural practices, the roles of cooperating institutions are critical. She said that a qualitative survey had been carried out with 500 artists but that it would be necessary to carry out such surveys with local people in the future. Amarílis Felizes (invited stakeholder, Axis 3, ESCH, Plateia, Portugal) presented Plateia, a national association for the performing arts, with 100 small groups, mainly theatre troupes and 300 workers and professionals. She considered it very important to work with the UNCHARTED project because much information is missing from Portuguese information systems, and the data is often poor about cultural practices, participation, creative sectors and artists. The association's members operate largely on public funds but do not know how the national cultural policy evaluates their activities. While the arts groups provide many data, no one can access it.

Gábor Sonkoly (ELTE) concluded that these are fundamental aspects to see the stakeholders' contributions in these processes. This a great challenge how to involve different groups. The main Portuguese case shows how different levels of stakeholders communicate with each other. Many stakeholders do not know about each other, so data, information and knowledge can be lost. Volterra

is a symbol of cultural resilience, where it is exciting to see conscious and unconscious elements coexisting and how the future can be built upon them. He suggested what could be put together in the three axes: what guarantees this cultural success? How should the different scales and information not get lost, and how do the stakeholders get together to plan for the future? How can these small-scale initiatives prepare for an uncertain future through these co-creative techniques?

## Session 2: Parallel discussion sessions on future work in the three axes

*Parallel session 2.1 – Axis 1. Cultural strategic planning*

**Chairs:** Antonella Fresa (PROMOTER) and Eszter György (online) (ELTE)

**Participants:** Nancy Duxbury, Sebastian Zuñiga Gougain, Claudia Pato Carvalho (online) (CES), Matías Zarlenga (UB), Alain Quemin (University of Paris 8, UB), Clara Levy (University of Paris 8, UB), Ulrike Meinhof (AB, Southampton University), Francesco Zollo (invited stakeholder, European Youth Forum),

Antonella Fresa offered two agenda items for the parallel session: a report on the June 13th municipal meeting and a presentation of the control cases. Unfortunately, at the moment, they could only review the control case led by the CES team (1.3. United Cities and Local Government Evaluation of city cultural policies and Programmes in Europe). For the other case led by UPorto, the only Porto team member in the Barcelona workshop, João Teixeira Lopes, co-leading the Axis 3 parallel session. Antonella also said that the Portuguese and Volterra case link might be better articulated through the European Capital of Culture programme. She then presented an initial analysis of the June workshop. The questionnaire will be published at the end of June, and there will be a second round of interviews, with main focus points on the educational and private sectors and citizens' voices. Two main obstacles were encountered when studying the education sector: education is organised in the national state hierarchy, with no direct link to the municipality; culture and education are two separate domains, administratively and social practices. For the future, to understand the strengths and weaknesses, in this respect, the control cases are very relevant to complete the main case. Antonella stressed the importance of establishing permanent stakeholders' dialogue with the municipality.

Francesco Zollo (invited stakeholder, European Youth Forum) confirmed that by integrating the youth NGO in the process, they were able to put pressure on the municipality to involve young people before any cultural policy-related decision was taken. It is also important for young people to be able to imagine their future in a small town outside the urbanised metropolitan areas. Alain Quemin (University of Paris 8, UB) confirmed that cultural policies in many European countries strongly focus on young people, but asked what about the older people? He stressed the importance of reminding policymakers of the demographic fact that European societies are ageing and need to be given special attention to these groups as well in the field of cultural policies. Ulrike Meinhof (AB, Southampton University) added that the generational issue is interconnected with social class and gender dimensions. Francesco Zollo noted, however, that public incentives are needed to encourage young people not to leave small towns like Volterra. Antonella Fresa (PROMOTER) concluded that it will be important to include this aspect in the work of the coming months.

Concerning control case 1.3, Nancy Duxbury (CES) took the floor. She hoped the control case would be useful for the main case as a reflection. UCLG has conducted pilot programs to build capacities locally on cultural strategic planning and actualise network dynamics. It has been observed that there was only an internal informal evaluation of this process and no external (formal) evaluation. CES assesses the programs and documents developed by UCLG to inform the programs and look into some of the city reports. UCLG's main strategical document is *Agenda 21 for Culture*, including nine domains of actions and 100 actions. The CES team compared these with the main value domains defined by UNCHARTED to see the correlations and the emphasises. These will be examined to see how far they apply or can be applied in the Volterra case. Sebastian Zuñiga Gougain (CES) noted that the analysis will be carried out in line with the UNCHARTED Deliverable D2.7 (Overview of the multiplicity of values of culture and its controversies). Antonella Fresa (PROMOTER) added that since Volterra plans to develop a permanent stakeholder forum, this matrix/framework could be a useful tool to facilitate the evaluation. Alain Quemin (University of Paris 8, UB) noted that case studies could be used to fine-tune which values are appropriate or not in the framework.

*Parallel session 2.2: Axis 2. Culture-led urban regeneration*

**Chairs:** Mariano Martín Zamorano (UB) and Gábor Sonkoly (ELTE)

**Participants:** Arturo Rodríguez Morató, Victoria Sánchez Belando (UB), Rosa Gibert Pibernat, Eva Soria Puig, Montserrat Tort Bardolet (invited stakeholders, Institute of Culture of Barcelona, ICUB)

The session focused on the evaluation workshop, especially regarding topics and participants. There are many European networks, and the sectors involved in culture-led urban regeneration should also be considered. The participants drew up a list of names of potential participants. Concerning the axis interaction scheme, it was considered to look at forms of participation and territorial inscription in these control cases and these impacts on evaluation techniques. It will be associated with the representativeness of value plurality, participation and governance.

*Parallel session 2.3: Axis 3. Cultural information systems*

**Chairs:** João Teixeira Lopes (UPorto) and Gábor Oláh (ELTE)

**Participants:** Emanuel Négrier, Julien Audemard (CNRS), Paolo Ferri, Jessica Tanghetti (UNIBO), Arianni Batista Rodríguez (UB), Vera Borges (invited stakeholder, CIES-Iscte, University Institute of Lisbon), Amarílis Felizes (invited stakeholder, ESCH, Plateia)

João Teixeira Lopes (UPorto) took the floor as Axis 3 leader and presented the planned topic of the parallel session, covering future steps, particularly interactions between control and main cases. Participants agreed on the general structure in which control cases relate to main cases: the interaction scheme should be organised around challenges that the main case is encountering. In this sense, the control case provides the main case with information and analysis contributing to its development. Paolo Ferri (UNIBO) presented the control case 3.3, particularly on the data collected by the Emilia Romagna Region Cultural heritage agency. He stressed that almost exclusively quantitative data is collected in the region with the main objective of assessing the quality of museums

in order to develop policies and allocate budget. Emanuel Négrier (CNRS) noted that the Department of Studies, Prospective and Statistics (DEPS) in France - analysed in the control case 3.2 - collects largely quantitative data for strategic observation purposes to monitor whether state/regional policies are being followed. The two control cases are oriented toward quantitative data collection and provide little information on cultural activities, behaviours and attitudes. However, it would be essential for various levels of stakeholders to have better visibility of these aspects. It is one of the objectives of Axis 3, João pointed out, to gather the needs for the renewal of the Portuguese cultural information system through stakeholder workshops. It was confirmed by Vera Borges (invited stakeholder, CIES-Iscte, University Institute of Lisbon), who said it would be important to see why and who is participating in cultural practices. These can lead to questions that examine the interrelation of cultural, social and political behaviours. Participants noted that an important improvement in cultural systems should be the crossing domains of practices: to link cultural practices and social aspects or political behaviour. Based on the data available difficult to demonstrate the intersection of cultural practices and political participation, participation in social life, engagement in organisations etc. It is almost impossible today because data do not exist or are not accessible. Based on the data available, it is difficult to demonstrate the intersection of cultural practices and political participation. To summarise, at the end of the session, the axis 3 interaction schemes would be built up on interrelated but separate topics:

Control case 3.2 by the CNRS team will explore the data and data delivery mechanisms associated with the social and political dimensions of cultural activities in the DEPS system.

Control case 3.3 by the UNIBO team will examine the data collection methods of the regional cultural heritage agency, which is intended to align with the UPORTO's recommendation on creating regional observatories in Portugal.


## Session 3: WP5 Wrap up and general discussion about UNCHARTED experimental demonstrations

**Chairs:** Gábor Oláh and Gábor Sonkoly, Eötvös Loránd University


Antonella Fresa (PROMOTER) summed up the Axis 1 parallel session. They started the session by presenting the control cases and their possible links with the main cases. An important point raised was that internal discussions should be about the meaning assigned to the term 'control'. It suggests that the interaction between cases should be described. It was also mentioned that the main case has a strong focus on youth. Questions were raised about older people, the relationship between arts and culture, and generational issues. It is vital given the demographic trends in Italy and Europe today. What policies are in place to make culture accessible to older people? The session participants then listened to a presentation by the Coimbra team on the control case in which they are studying United Cities and Local Government (UCLG). The participants agreed that the matrix developed by the Coimbra team based on the experience of UCLG and the UNCHARTED project would be the basis for the interaction scheme between the control and the main case. It will allow Volterra, for example, to use it to assess what further action is needed.

Mariano Martín Zamorano (UB) summarised the Axis 2 parallel session. They focused on the evaluation workshop, especially regarding topics and participants. There are many European networks, and the sectors involved in culture-led urban regeneration should also be considered. The

participants drew up a list of names of potential participants. Concerning the axis interaction scheme, it was considered to look at forms of participation and territorial inscription in these control cases and these impacts on evaluation techniques. It will be associated with the representativeness of value plurality, participation and governance.

João Teixeira Lopes (UPorto) talked about the outcomes of the axis 3 parallel sessions. The participants considered it important to feed the achievements of the UNCHARTED project into the axis, particularly WP3. It was raised that it would be important to analyse biographical pathways: how people engage with culture from a diachronic perspective. How do they qualify for their practices? How do those practices impact their lives and the social contexts at the micro- and societal levels?

Furthermore, participants considered it important to conduct cross-sectional analyses between cultural practices, political attitudes and citizenship (e.g. social capital, trust in institutions). They hypothesise that they are highly interrelated, but more information is needed about them. Gábor Oláh (ELTE) stressed the importance of combining political, social and cultural data and noted that sometimes it is available but fragmented, or there is simply a lack of willingness on the part of institutions to provide access to it.

# Concluding remarks

In the closing remarks of the WP5 session, Gábor Sonkoly (ELTE) returned to the four tasks set at the beginning of the day. He expressed the need for a clear calendar of the (1) final evaluation events organised by the main cases. For the Volterra case, this is already scheduled for October 30th 2023. In the case of Barcelona, it could be an international network of cities, not in the form of a single event, but in separate discussions. In the case of Portugal, it is not yet clear how this event is envisaged. These 'workshops' results will be channelled into the (2) policy seminar in Budapest. In terms of the policy seminar, synergies with WP4 should be considered.

Regarding the (3) deliverable D5.3 (Assessment report), the relationship between main and control cases is essential. He was very motivated to include the issue of cultural rights in the protocol and, thus, in the assessment report. He stressed the importance of qualitative measurement, especially in dynamic contexts such as the interaction between different social groups. Finally, the issue of participation is fundamental to see the differences as they operate in various contexts. The last point is the (4) UNCHARTED book, which brings together much of the experience of WP5 and the whole project.