**UNCHARTED**

Understanding, Capturing and Fostering the Societal Value of Culture

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**Project Coordinator:**

Prof. Arturo Rodriguez Morató
Universitat de Barcelona
Email: rodriguez.morato@ub.edu

**Technical Coordinator:**

Antonella Fresa
Promoter S.r.l.
Email: fresa@promoter.it

**Project WEB site address:**

http://www.Uncharted-culture.eu

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# 1. Seminar Rationale

The international policy seminar was held in Budapest on 8 December 2023, hosted by ELTE University at the Faculty Council Hall, Faculty of Humanities. The seminar happened in a hybrid format, in co-presence and remotely.

This seminar 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. More precisely, representatives of European institutions, as well as policymakers at international, national, and local levels, have been invited to discuss and review policy briefs, recommendations, and guidelines on the basis of the actual needs of the participating stakeholders' territories.

Results and recommendations from Work Packages 4 and 5 were shared and discussed with policymakers and stakeholders. The seminar was divided into three sessions. The first was devoted to recommendations and results from the analysis of cultural policies in Europe undertaken in WP4. It was organised around two axes: (1) the coherence regarding values, governance model, and social accuracy of cultural policies; (2) the coherence of cultural policies' implementation. The second session was about the analysis of cultural organisations – corresponding to the second strand of WP4. Once again, two axes of discussion were defined. The first one questioned the role of cultural institutions in fostering the plurality of cultural values. The second one addressed the question of evaluation from the institutions' perspective. The third session concerned cultural strategic planning of cities' cultural policies as it was investigated in WP5.

ELTE organised the seminar in collaboration with UB, the project coordinator, and the CNRS, WP4 lead partner.

# 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 policymakers:

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**Consortium**

Partners come from 7 European Countries: France, Hungary, Italy, Norway, Portugal, Spain, UK.

1. **Universitat de Barcelona** (Coordination): Victoria Sánchez Belando, Arturo Rodríguez Morató, Mariano Zamorano, Matías Zarlenga.

2. **Eötvös Loránd Tudomanyegyetem**: Eszter György, Gábor Ólah, Gábor Sonkoly

3. **University of Coimbra**: Nancy Duxbury, Cláudia Pato Carvalho [remotely], Paula Abreu, Silvia Silva [remotely]

4. **University of Bologna**: Paolo Ferri

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**: José Ricardo, João Teixeira Lopes

8. **Goldsmiths, University of London**: Victoria Alexander, Cecilia Sosa

9. **Promoter S.r.l**.: Antonella Fresa

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| **Advisory Board** |
| Ulrike Meinhof – School of Humanities, University of Southampton |
| **Invited stakeholders and policymakers** |
| Sara Brighenti – Subcomissária, Deputy commissioner, Plano Nacional das Artes, Portugal |
| Simone Dudt – European Music Council |
| Lars Ebert – Culture Action Europe |
| Graeme Evans – University of the Arts London, United Kingdom |
| Neil Forbes – Coventry University, United Kingdom |
| Abid Hussain – Director, Diversity, Arts Council England, United Kingdom |
| Gábor Kerpel-Fronius – Vice-mayor of Budapest, responsible for smart city, Hungary |
| Ludovica Michelin – Consultant in cultural policy/EU-related projects, Italy |
| Maria João Mota – Coordinator of PELE, Cultural and Social Association in Porto, Portugal |
| Preben von der Lippe – National Arts Council, Norway |
| Caroline Vabret – DRAC Occitanie, France |

# 3. Seminar Sessions

## Welcome Message by Gábor Sonkoly (Eötvös Loránd University) and Arturo Rodríguez Morató (Universitat de Barcelona)

After welcoming the participants and especially the invited experts, Gábor Sonkoly (Eötvös Loránd University) introduced the seminar by reminding the relevance of organising a policy seminar on cultural policies in Budapest in an illiberal context. Arturo Rodríguez Morató (coordinator of the project) then gave a brief overview of the UNCHARTED project: focusing on the dynamics of valuation and evaluation of culture, the UNCHARTED project is now in its last phase, analysing how cultural administrations and institutions integrate these dynamics and trying to produce recommendations in order to improve decision making and action in the cultural field. From this perspective, Arturo Rodríguez Morató acknowledged the importance of this policy seminar and the exchanges with policymakers and cultural policy experts. The schedule of the day was then presented, with the morning session devoted to the discussion of results and recommendations from the analysis of cultural administrations and institutions and the afternoon session devoted to cultural strategic planning.

## Session 1: Between discourse and action: value tensions in cultural administrations

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

*Introduction to the comparative research on cultural administrations: values, implementation and governance, by Félix Dupin-Meynard – CNRS*

Félix Dupin-Meynard started by giving a general overview of the session, which was divided into two topics: value, coherence, prudence, and duration; the second topic concerned the implementation of cultural policies. Félix then presented the speakers: on the first topic, Emmanuel Négrier and Mariano Martín Zamorano (Universitat de Barcelona) will present the recommendations, followed by the feedback of Simone Dudt from the European Music Council, Preben von der Lippe from the Norwegian National Arts Council, and Caroline Vabret from the DRAC (Regional State Directorate of Culture) of Occitanie (France); on the second topic, the recommendations will be presented by Ole-Marius Hylland (Telemark Research Institute) followed by a discussion by Sara Brighenti, Subcomissária and Deputy commissioner at Plano Nacional das Artes (Portugal).

Félix then reminded us that the general objective of the work was to provide a global analytical view of decision coherence in relation to the promotion of the values of culture in an internal and inter-territorial perspective and with respect to the value of configurations in society. The first research question was to understand the plurality of the definitions attached to cultural values within administrations in Europe and to identify tensions between these definitions. The second research question was to evaluate the internal coherence of values promoted in policy programmes in the light of implementation tools and budgets. The third research question concerned governance and adaptability of cultural policies, assessing the degree of democratic openness in the definition and implementation of cultural values.

Félix then presented the empirical work achieved to answer these questions. The analysis focused on the study of 13 administrations at the European, national, regional, and metropolitan levels. A specific focus was made on the music sector to exemplify the potential tensions in the definition, implementation, and governance of cultural policies. In three countries, France, Spain, and Norway, the national, regional, and city government levels were investigated, while in three other countries, the analysis focused on the national level only. The European case was also included in the sample with a study of Creative Europe. The study is based on document and budget analysis as well as around 100 semi-structured interviews done with politicians, bureaucrats, and experts. Félix ended this introductory talk by describing the comparative approach characterising this work, where the efforts of the research team were oriented toward identifying factors and trends explaining the global changes in cultural policy values in Europe over the last decade.

*Value coherence, governance and accuracy*

*Research results and recommendations, by Emmanuel Négrier – CNRS – and Mariano Martín Zamorano – Universitat de Barcelona*

Emmanuel Négrier began the presentation with a question: In the name of what public policies define norms, instruments, or images to justify themselves? Emmanuel reminded us that several values play the role of guiding principles of cultural action. The first one is artistic freedom. It is the primary

justification of cultural policy in Europe, nourishing a discourse on the autonomy of public action vis-à-vis the economy. However, amid the cases investigated, Hungary and the European Union represent exceptions because in Hungary, the cultural policy is more oriented toward control than freedom, and the European Union pays more attention to economic valuation than artistic valuation.

The second value is democratic access to culture, both in terms of territorial and social dimensions. This second value materialises in the implementation of cultural policy through the territorial presence of the state administration and multilevel cooperation. At the same time, democratic access is a source of tensions regarding the participation of citizens in the making of cultural supply or about the ways stakeholders define and appropriate the notion of access. Once again, Hungary and the European Union can be seen as exceptions, Hungary for a lack of cooperation and the European Union for its lack of territorial effectiveness.

The third value refers to the idea of sustainable building, which we can subsume in the concept of 'Bildung' inherited from the romantic German tradition. Culture in policy discourses is presented as a means to build and rebuild welfare state citizenry, recognition, inclusiveness, and collective identification.

Emmanuel ended his speech by shedding light on two paradoxes. First, whereas values are supposed to be autotelic (without any hierarchy), they are constantly in tension. Second, whereas values seem to be the most essential principles of cultural policy, they remain, in general, absolutely implicit. The risk here is that it leads to double discourses. Regarding this, Emmanuel presented a first recommendation:  To avoid double discourses, **it is necessary to give more room to public debate about cultural policy values**.

Mariano Martín Zamorano then presented the results regarding cultural policies' governance and social accuracy. He defined the general approach used in the study, which emphasised social, cultural, political, and historical factors shaping governance structures, as well as the capacity of cultural policy actors to adapt their actions to societal changes.

The analysis revealed several models of cultural policy in terms of governance, with Hungary showing strong specificities, where governance is characterised by a ritualistic approach with only small consultation or public debate. In other cases, and in general, governance dynamics tend to be top-down, participation mechanisms decrease as we move up in government levels, and institutional participation mechanisms tend to be weak and excluding, even at the local level. In other words, while participation as a value is something that is a part of social demand, it is not really promoted in policy designs.

From these results, Mariano Martín Zamorano presented three recommendations. The first one is that **more promotion of transparency and citizen access to cultural policy content and data can operate as an indirect mechanism to encourage citizen involvement in cultural policy-making processes**, mainly at the regional and central levels. Second, at the local level, **the creation of flexible mechanisms, as well as open spaces in proximity contexts (face-to-face and telematic), can mitigate the limits to participation** given by the lack of resources to participate on citizens' side (time, knowledge of the specific contents and "training" for taking part). Third, in the absence of binding mechanisms, participation is often perceived as a mere fake or as the legitimisation of a decision

already taken; **the creation of mechanisms that allow greater citizen control, in this sense, operates as an incentive to get involved**. Fourth, **pedagogical actions among social, public and private actors involved in relation to democracy and equality (from a civic and social rights approach) as constituent values of cultural policy support citizen involvement in cultural action at all levels**.

Regarding social accuracy, Mariano Martín Zamorano stressed that while a robust social demand supporting the emergence of new cultural values actually exists, we were right now facing a rise of nationalism and a new understanding and criticism of multiculturalism in Europe. The results of our study show that while the local government level is more accurate socially, the regional policies follow the same schemes and programmatic understanding of values as the national level, which reflects longstanding cultural policy models recognised by the academic literature. Creative Europe policies are characterised by a subsidiarity framework favouring structured and wealthier actors and a centralised approach with limited representation of social diversity.

Three recommendations were presented in this regard. First, **to implement inclusive decision-making processes**: Actively involving representatives from diverse social groups (age, gender, origin, etc.) in policy discussions and decision-making processes and foster partnerships with civil society organisations and cultural institutions that specialise in promoting the interests of underrepresented or marginalised communities. Second, **to promote cultural diversity in funding allocation**: Develop funding models that prioritise cultural initiatives and projects reflecting socio-cultural diversity. Ensure that financial resources (i.e. grant systems) are allocated to supporting a wide range of cultural expressions and activities, taking into account the needs and preferences of various social groups and empowering communities. Third, **to encourage localised cultural policy adaptations**: Support the development of regional and local cultural strategies that address the specific challenges and opportunities faced by diverse social groups. This can involve capacity-building programs, knowledge-sharing platforms, and collaborative initiatives that empower local actors to shape cultural policies actively.


***Policymakers' comments, by Simone Dudt – European Music Council – Preben von der Lippe – Norwegian National Arts Council – and Caroline Vabret – DRAC (Regional State Directorate of Culture) of Occitanie (France)***


Simone Dudt first reminded us that the European Music Council is a network of 78 music organisations in 28 European countries, defending the values of music rights, expression of freedom, musical expression, access, access to education, and the right for musicians and artists to live through the arts that they are making. Simone stressed that it is fascinating to see that culture has so many meanings or cultural expressions. Culture is a form of art, but it is also a tool for social change inclusion. It can be a unifier, and it can really foster social engagement and, therefore, really contribute to the democratic development of societies. At the same time, culture and music are products with economic implications.

The power of culture for identification includes that it also has a power of separation - this always goes both ways. When there is a solid power to unify, it also includes the power to separate, e.g. music used in war times (e.g.Nazi times, distinct yourself from others through music).

Simone made a connection between this policy seminar and the fact that EMC also held its key event in Budapest this year. However, some would argue that you support an authoritarian regime by going with your events to such a country that clearly violates freedom of expression, e.g. by replacing persons from art institutions or the media law. As a civil society organisation, EMC finds it very important to keep the dialogue open and to strengthen the cultural actors in these authoritarian, non-democratic societies.

Regarding democratic access, Simone recommended investigating policy areas not directly connected to culture, such as education. In terms of governance, she reminded about the fact that Creative Europe is the best funding programme at the EU level to support the culture sector as it really reflects the needs, considering that all other funding programmes that might also fund culture, e.g. Erasmus+ and Horizon, are not really tailor-made for the culture sector. Also, even if CE is top-down, it currently does make an effort, e.g. through MusicAIRE – a project that re-distributes EU funding to more minor actors and with a strong involvement of the music sector and consultations beforehand – so CE is making an effort to meet the participative nature. With regard to diversity, Simone recommends that the consortium should also have someone with a diverse background check the recommendations on diversity.

She finally indicated a shortage in the previous presentation about the topic of sustainability – because this is what we currently see as being imposed as a new area that the culture sector should reflect in its action. This clearly is clearly an area that is introduced as an add-on by policymakers.

Preben von der Lippe started his presentation by recalling the egalitarian nature of Norway, with a welfare state with high levels of social and economic security and consumption (as in the EU), paid in part by oil. Norway is characterised by a consensus about many central values of art, culture, and culture policies and a tolerant public discourse (at least within the field of art and culture). There is considerable acceptance of the breadth and variety of cultural and artistic forms, expressions, genres and cultural niches and little preoccupation with debating the allocation of public funding to the areas of culture.

Consensus brings some trust, openness and transparency. On the other hand, there is avoidance of conflict and sparse cultural debate and confrontation. Consensus and tradition mask implicit and tacit values. The Norwegian Arts Council allocates about 7 % of the national budget for culture (the non-institution funding). Music is by far the largest allocation within the Arts Council, with 40 % (NOK 400 million.) of the total budget of NOK 1000 million. (grants to composition, music production, performers, ensembles, bands, recording, concert production, concert promoters, festivals).

Preben wondered, in reading headings and points in the slides, about what kind of incoherencies the consortium was studying since they are not specified. However, Preben agrees that there are indeed incoherencies between, for instance, values and goals in governmental documents, ministry investigations and notes to parliament on the one hand, and on the other performed policy, which amounts to, in large, public funding of activity, businesses and institutions. The unwillingness of the government to take action to confront identified challenges in cultural policy and to raise strategic funding in arts and culture results, of course, in preserving traditional values and in unequal access to arts and territorial inequalities.

Preben acknowledged that there is a transformation of traditional global values and concepts in cultural policy, the fields of art, and society. He believes there are other and new values and goals that enter the field that still come under suspicion of being instrumental, such as cultural diversity and sustainability with the reduction of emissions. The hierarchy of values mentioned in the presentation is indeed present, with artistic freedom, the intrinsic value of art, and the autonomy of artists, institutions, and arm's length funding bodies being privileged over other "instrumental" values.

Preben wanted to state an argument that the concept of the value of art, in fact, has been transformed in specific and relevant ways in recent times, with implications for policy and, more importantly, that

this changes the relation between fundamental values that the presentation that the consortium's research identifies. It is a change in the relationship between artistic freedom, autonomy and intrinsic values on the one hand, and democratic access, mediation to the public, and the response of audiences to art on the other. Preben argued that it pertains to the force of culture to build communities.

Preben's experience in culture shows that the concept of art and its value have changed substantially. Concepts like value, quality, and professionalism have been challenged. Specifically, Preben experienced in cultural life, and specifically in the Arts Council Norway, that value and quality are accepted as something that arises in contexts of recipients and participants in public gatherings and discourses. Cultural contexts, niches and environments are lived. Public audiences perform them with different but specific embodied competencies for entering into meaningful individual and joint public and social experience, discourse, and valuing of art and culture. Value depends on reception and community. It is admittedly relative, but the point is that value arises in the action of listening, reading, and viewing.

Another change is that of the concept and understanding of quality: Quality is now not understood as universal or ordered in hierarchies but instead accepted as specific multiple properties of the actual art presented, and perhaps more precise, the public experiences of this art (like in a specific texture of a textile.). The move away from a view of autonomy, intrinsic value and hierarchies of quality in the direction of recipients and cultural reception points to a more important role and status of audiences and the public, with implications for the funding of curatorial practices, presentation, dissemination, distribution, live, marketing, mediation.

In the presentation, demographic access is presented as a political goal and a citizen right. Goals and challenges in obtaining democratic access are, of course, central to policy: accessibility and outreach to diversities in culture, age, gender, disadvantaged, minorities, and geographical access, regional and local environment are evident and commonplace in cultural policy (at least in a Norwegian context). However, at the same time, the changes in values presented above imply that qualities, values, and meaning of art and culture change from place to place, from cultural practice to cultural practice, and from time to time. They are created by the actual audiences present: place, local groups, and cultural niches create and define art and its qualities and values.

This could prompt policymakers to pay closer attention to how and where to make art accessible and thus value curators and concert promoters even more. More importantly, Preben's suggestion is to prioritise local environments, audiences and the production of local and regional public spheres but for different reasons than before. Presentation and dissemination of art could be valued and incentivised more in cultural policy. The fact that the stimulation of curators and promoters may add to sales and income from markets is an additional effect that, in turn, enhances artists, production teams, and the culture industry's economy.

Audience presence and public discourse about art and culture, as well as in social media, are a total of public participation. One can extend the arguments given about the role of audiences and local cultures into the role they have in building communities and society. Audiences in concerts, performing arts, and film participate in events, and their experience is synchronic to the situation. Art is, in all these situations, an event or the 'object' of the everyday experience, and as such, lets the public sphere be created and play a key role in producing identity culture and building society. Preben would mention here that one could invoke a Habermasian argument about the role of the public experience of art as playing a pivotal role in generating public spheres at different levels and within different media.

Caroline Vabret first spoke about the question of governance, giving three examples of consultation processes that already exist in France: the COREPS, a regional committee where representatives of the cultural sector meet with representatives of the local administrations; the Conseil local des territoires pour la culture, which is the local committee of territories for culture, which gathers

representatives of the local authority, that is elected representatives, which themselves represent the citizens; And the third one, which is an initiative of the region, not of the ministry, which consists in organising extensive citizen consultations during about a year in order to build its cultural programme. According to Caroline, the challenge should then be to take these processes more into consideration, maybe to give them more capacity to ensure better complementarity between the different levels of government.

Caroline then explained that what is being debated in France is not so much the values and the reality of their implementation since this implementation is very different according to different levels of governance. At the ministry level, several tools actually exist in order to foster greater accuracy of cultural policies: Information systems, such as open data resources; public inquiries and satisfaction surveys; and evaluation of public policies that have been increasingly developed in France over the last few years.

Inclusion has also been a priority for the French Ministry of Culture. Recently, on 22 February 2023, the '3D' law has been adopted in France. The three 'Ds' stand for 'Decentralisation', 'Deconcentration', and 'Differentiation'. The main objective of the law is to give greater importance to territorial specificities in the implementation of public policies. Although the French tradition puts a greater emphasis on universalism, a fundamental shift is at work, with more and more attention on diversity.


*Questioning implementation coherence*


***Research results and recommendations, by Ole Marius Hylland – Telemark Research Institute***


Ole Marius Hylland started by presenting the central question of this second part of the session: Are there significant differences between the values displayed in the cultural policy programmes and the implementation of these programmes? The focus here is on incoherence, defined as the lack of consistency between the explicitly stated cultural policy values on the one hand and the actual factual and practical policy on the other hand in, for example, support measures, financing priorities, organisation and administration. Ole Marius then explained that incoherence can be regarded as a problem if we want policies to be legitimate and trustworthy. However, at the same time, Ole Marius would also like to state that incoherence might also, in specific contexts, be a productive force. It can create a need to refine, specify and concretise what we mean by the different values used to legitimate different varieties of cultural policy.

Ole Marius explained that the investigations led to the identification of five primary forms of incoherence. First, incoherence can be observed between what is an actually explicit political priority and what is actually prioritised. Second, incoherence due to lack of funding to back up policy values. Third, different interpretations of the same value. Fourth, incoherence can also exist because of a lack of a governing structure to back up and implement cultural policies. Fifth and finally, value is acknowledged as essential, but yet with no impact on implementation.

Ole Marius mentioned that the research has led to finding significant differences between countries. However, a proper comparison is challenging because of quite specific differences in national contexts. The level of coherence, though, appeared very different between the different countries. Three very salient and apparent differences between the countries are the accessibility of explicitly stated values in political documents and strategies, the general level of consensus regarding political values, political priorities, or the process of contested values, and the actual presence of bureaucratic structure to carry out the implementation. Both internal and external drivers can explain these differences. Of

course, it has a lot to do with the economy and the availability of funding, but it can also have something to do with the political system and, more generally, the current political ideology in place and the cultural policy model that the country in question is marked by. Internally, explanations could refer to the level of systematic planning, the cooperation between different levels of government, and political stability. One of the significant results found across the countries is the impact of budgetary constraints. The dominant model of cultural policy serves to explain some of the differences with, in the Architect model countries, challenges and inconsistencies revolving around the inefficiency of vertical instruments and limited cross-sectoral policies, while in the Patron state model countries, a focus on the distribution of responsibility within the arm's length principle. The degree of decentralisation in these countries might explain the differences as well. In Norway, maybe the least decentralised country among those who were studied, a conflict between the national, local and municipal administrations regarding the specific practice of the arm's length principle was observed, which is held in very high regard, and a limited regional capacity suffering from some level of distrust expressed by the state and cultural professionals. In the more decentralised country of France, we see that decentralisation has allowed regions to develop cultural policies that are more or less independent from the state. However, at the same time, a weak bureaucratic apparatus at the regional and municipal level limits the programmatic objectives.

From these results, Ole Marius presented five recommendations to improve the coherence in the cultural policy implementation. First, **to implement transparent and explicit policies**. A second recommendation is, of course, **to increase and prioritise funding of culture**. Third, in order to have less value conflicting conceptions, it could be an idea t**o increase bureaucratic competence both at the top level and the street level**, creating shared conceptions of value and increasing dialogue between stakeholders at different levels. When it comes to the incoherence between political values and governing structure, a natural recommendation would be **to develop and professionalise a competent cultural administration**. Finally, dealing with emerging values implies **pursuing long-term and dynamic policies combining long-term goals and the ability to respond to innovations and challenges**.

***Policymakers' comments, by Sara Brighenti – Subcomissária, Deputy commissioner, Plano Nacional das Artes, Portugal***

Sara Brighenti started to present the Portuguese government's National Plan for the Arts, which is an inter-ministerial mission. She then would like to stress that the values that are explicit in the cultural policy are not always coincident with the values that are found in society. The National Commission for the Arts has a decentralised structure helping to dialogue with the communities and the people all over the territory. From this perspective, Sara acknowledged the importance of trusting, monitoring, evaluating, and fostering artistic creation from a more bottom-up approach.

Regarding the recommendations that were presented, Sara would like to point out that cultural rights should always be a priority in policy and funding and that participation and cultural democratisation should be increased all over. The strategy of cultural policies should be to reinforce not only activity but community building as well. The issue of autonomy versus control is essential to pay attention to as well since cultural policies are dealing with increasing cooperation.

Sara noticed, like other invited experts, the lack of the word sustainability in the presentations. Sustainability and diversity fight inequality and asymmetries in territories. She also stressed the importance of speaking about the dangers of following values that are linked to national heritage and national identity. In terms of exclusion, these national values can be hazardous. To avoid this risk, Sara recommended listening and providing the conditions for artistic and cultural expression rather than

conditioning. She also stressed another risk associated with the marketisation of culture, which is the bureaucratisation of cultural expression.

Finally, Sara underlined that what she has learned would be to listen more, follow more bottom-up approaches, and increase public debate and participation. For that, the incapacitation and training of experts are decisive, but she also mentioned the crucial role of networks and sharing a common vocabulary.

## Session 2: How do cultural institutions promote and evaluate the plurality of values?

**Chair:** Julien Audemard – CNRS

*Introduction to the comparative research on cultural institutions: plural values and evaluation, by Julien Audemard – CNRS*

Julien Audemard started with a presentation of the topics of this session. The main objective is to discuss results and recommendations from research focused on cultural institutions, aiming 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 inclusion. The research carried out, from which the following recommendations will be made, is organised around two questions. First, to what extent and how do cultural institutions' configurations and action strategies favour cultural diversity, equality, and inclusion? Second, how does evaluation affect the action of cultural institutions?

The empirical analysis follows a mixed-method qualitative approach, with semi-structured interviews, document analysis, focus groups, and observations. It consists of 8 case studies, reflecting the plurality of cultural administrations in Europe: 'The Glove Factory', a community centre in Budapest; 'Újpest Roma Local History Collection and Community Center', another community centre in Budapest; The Museum of Culture (Mudec) in Milan; The Austrian pavilion at the 2023 Biennale in Venice; 'PELE', an association in Porto; 'Sonoscopia', another association in Porto; 'Gasworks', a contemporary art organisation in London; The Nottingham contemporary art museum.

Julien then presented the programme of the session, which was organised around presentations by partners in charge of the research and feedback by policymakers. The session is divided into two topics, corresponding to the questions presented above: the first one concerns the promotion of the plurality of cultural values by institutions; the second discusses the evaluation of institutions' impact in terms of values. On the first topic, results and recommendations are presented by Paolo Ferri (University of Bologna) and Gábor Ólah (Eötvös Loránd Tudomanyegyetem). The presentations are followed by feedback from Gábor Kerpel-Fronius – Vice-mayor of Budapest, responsible for the smart city – Abid Hussain – Director, Diversity, Arts Council England – and Ludovica Michelin – Consultant in cultural policy/EU-related projects, from Italy. On the second topic, results and recommendations are

presented by João Teixeira Lopes (University of Porto) and Victoria Alexander (Goldsmiths), followed by a discussion by Maria João Mota – Coordinator of PELE, Cultural and Social Association in Porto.

*Promoting the plurality of values*

### Research results and recommendations, by Paolo Ferri – University of Bologna – and Gábor Ólah – Eötvös Loránd Tudomanyegyetem

Paolo Ferri started to present the approach developed to address the question of how cultural institutions promote values of inclusion, diversity, and equality. The University of Bologna team has developed an interpretation scheme to analyse these values. Regarding inclusion, the aim was to analyse what the target audience is and how it is involved. Regarding diversity, the research focused on the central theme of the initiative and the type of diversity addressed. Finally, regarding equality, the focus was on admission criteria, specifically on pricing policy.

The cases of the research made by the University of Bologna were selected regarding several criteria, the first one being the coexistence of public and private actors: the first case, the Mudec, is a public/private partnership between Municipality of Milan and 24Ore Cultura (a private listed company); the second case, the Austrian Pavilion at the 2023 Biennale, is a national pavilion owned by Austria based at Giardini, in a Municipality site managed by Biennale (a private law foundation). The second criterion is the crucial role of contracts regulating the collaborations: in Mudec, the private partner tenderer of a 12-year concession contract; in the case of the Austrian Pavilion/Biennale, the Biennale has a 30-year concession contract by the municipality for the Giardini site. The third criterion is a different historical approach to equality, diversity, and inclusion values (EDI): in Mudec, it originated in 2015 from discussions on inclusive practices for migrant citizens (EDI embedded in the institution); for the Austrian Pavilion/Biennale, the Biennale was founded in 1895, far from the contemporary discussions on these values (EDI rhetoric was later integrated into the context of exhibitions). Finally, the last criterion is the existence of a conflict between parties, explicit in both cases.

In the case of the Mudec, the content of the activities reflects a distinct interpretation of EDI-related values. For the private partner, we observed a binary interpretation of inclusion and diversity, with tension between inclusion and equity. For the public partner, we observed instead a transversal interpretation of inclusion and diversity, offering different layers of readability in each initiative. In the second case, the provocative project proposed by Austria to provide free access to Venetian people (not authorised by Biennale yet represented in the pavilion) provoked a negotiation process that highlighted distinct interpretations of EDI-related values: the meaning of inclusion and equity was clearly a contested terrain—the different interpretation of EDI values closely related with the institution's business model. The heterogeneity of the activities/projects inspired by EDI values reflects the heterogeneity of the interpretation of values. The application of EDI values is generally accepted unless it conflicts with the institutions' interests.

Regarding these results, Paolo presented four recommendations for policymakers. First, beyond rhetoric, **to be explicit about the actual interest in promoting EDI values**. Second, be aligned and **co-define the meaning of EDI values and review it periodically throughout the partnership period**. Third, since truth lies in the middle, **acting as a cultural meta-mediator for the parties involved**. Fourth, in order to maximise the consistency with DEI values, **develop 'formal relational contracts' with explicitly shared principles, aims, and vision and continuously align partners' interests and expectations**.

The second speaker, Gábor Ólah, started to present the two case studies that feed the following results. These case studies are two community centres, reflecting diverse contexts and organisation modes. The Rácz Gyöngyi Community Centre is situated in the 4th district (Újpest) and houses the Újpest Roma minority self-government. It is funded by annual municipal and government funding and ad hoc grants. Its actions are directed toward local children and youth, often with Roma and disadvantaged social backgrounds, and consist of after-school education sessions, a Roma local history collection, and a Roma library. The second centre is the Glove Factory Community Centre, located in the 8th district (Józsefváros), run by a municipality-owned nonprofit company and funded by an annual allocated municipal budget. While the target populations are the same as the Rácz Gyöngyi Community Centre, its action consists of after-school education sessions, sports and cultural activities, an art gallery, and family support services.

Both centres display value strategies targeting social inclusion, cohesion, and community building, as well as cultural, educational, and recreational methods as the means of implementing values. In each case, value strategies are reflective of the local, socio-territorial context: EDI values strategies mean engaging local society, expressly hitherto excluded, marginalised communities. Finally, value implementation strategies are implemented through partnerships, collaboration and community participation. In the Rácz Gyöngyi Community Centre case, Gábor described an isolated structure operating as a quasi-NGO, conglomerating cultural, political, social, and educational functions. Individual credibility and personal relationships ensure the implementation of implicitly expressed value strategies. In the Glove Factory Community Centre case, the values of culture are understood within a complex social and urban regeneration policy. The open house concept and other activities convert the community centre to a 'third place'.

From these results, Gábor presented three recommendations. First, developing value strategies must be learnt: **Organising training to equip staff with adequate skills to manage and develop value strategies and evaluation systems**. Second, value strategies work if they are reflective: **Place-based challenges should be reflected in value strategies**. Third, **to test and integrate participatory elements in elaborating value strategies**, for instance, establish an 'advisory board' of local people to oversee the institution and its activities, promoting EDI values and contributing to making the cultural offer more reflective.

*Policymakers' comments, by Gábor Kerpel-Fronius – Vice-mayor of Budapest, responsible for the smart city – Abid Hussain – Director, Diversity, Arts Council England – and Ludovica Michelin – Consultant in cultural policy/EU related projects, Italy*

Gábor Kerpel-Fronius described his talk as dealing with making cultural policy and maintaining cultural institutions in a city which is proud and embraces its diversity, both historically and in the present and hopefully in the future, in the context of an illiberal democracy which has the tendency of becoming ideologically and culturally more and more monolithic, relying very more on personal and ideological loyalty than on institutions. In reaction to the team presentations, Gábor emphasised that one of the major topics of the Budapest 2019 municipality elections was the situation of the Roma community.

In the past decade and a half, Budapest has experienced a very rapid decline and even disappearance of Roma cultural institutions or Roma representational institutions. The Roma Education and Culture Center had quite a substantial budget but had no presence in Budapest's cultural life. A pretty widespread opinion was that the Roma community had a representative building in the city centre, which was a closed cultural institution. To solve this situation, it has been decided to find a new director for the centre. During a year and a half of preparation, the municipality tried to gather all parties who were in some way involved in the human rights struggles of the Roma community, cultural activists, artists, etc. It was decided to find a new building for the centre. Instead of one, two places were selected: one in the 8th district and another one in the 6th district, with two different functions: the first housing an art gallery and school activities, and the second housing a theatre.

The idea was to take into consideration the presence of Roma communities in different districts, not only to get people interested in Roma culture but to build up services which would enable advisors to start a dialogue with municipalities and cultural institutions in different districts to create meaningful programs. With this example, Gábor underlined the importance of collaborations – acknowledging the role of the Budapest Archive in making the Roma past accessible to people – along with personal initiatives in promoting minority cultures.

Abid Hussain said that the case studies that were presented really speak to some of the strategic changes introduced in England around equality, diversity and inclusion. One of the main questions is how do we make our cultural institutions more inclusive of the communities that they serve and more relevant to those communities? Abid stressed that inequity is inherent in broader society. Wherever we live, whether it is in Budapest or Birmingham, there will be inequity. It is not surprising, therefore, that institutions, whether political, civic or cultural, will have inequity built into their structures. This issue is crucial, and one of the challenges is that the purpose and the values of institutions need to adapt and change with society. A lot of cultural institutions have existed for many years, and they sometimes get stuck in a particular period where their values and creative programming are serving an initial purpose that they had, which does not seem to reflect what is happening around them in society. Inequity is increased because many of the funding systems and the funding processes continue to support organisations that focus on a very particular context without thinking about what needs to happen.

According to Abid, the case studies from Budapest show the importance of that community voice and the importance of talking to the people who live in the communities. So, one of the challenges to organisations is how they are going to change to reflect better the society that they are serving. This question has been a firm focus of ACE training and development programs in terms of how leadership needs to change. For Abid, the recommendation around collaborating with communities is incredibly vital. ACE developed a funding program where communities and arts organisations must come together to develop an offer.

Abid Hussain then described the ACE approach to increasing equity and relevance, which revolves around three fundamental principles. The first one is around the workforce, the leadership and the governance and how to be sure that it is inclusive and diverse. Second, ACE has moved away from just talking about audiences because audiences only deal with the people who already come. For talking about communities, we need to widen the focus to everybody who lives within a locality or a location. The third principle is programming and how to make sure the decisions made are something that extends the invite to the communities.

Ludovica Michelin started by identifying the misalignment of objective and different obligations as the main obstacle in promoting the plurality of cultural values, especially in terms of economic obligations. The root cause of this misalignment is the lack of program design, which lends support. She proposes to have more funding for analysis and design. Like Sara Brighenti, Ludovica stressed the importance of finding a shared glossary of open protocols and defining common strategies.

*Evaluating plural impacts*

***Research results and recommendations, by João Teixeira Lopes – University of Porto – and Victoria Alexander – Goldsmiths, University of London***

João Teixeira Lopes started with a presentation of the two cases investigated by the University of Porto team. The first case was 'PELE', a cultural association using art as a toolkit for participation, empowerment and social inclusion. PELE was created in 2007 and has been working systematically ever since in vulnerable territories, especially in the area of Azevedo, Campanhã (Porto). This association's work spreads on multiple fronts: a) artistic creation work; b) programming; c) NTO_Porto – Porto Theatre of the Oppressed; d) education/training; e) research – time and space to think critically about their practice. Their work targets different cultural facilitators, local communities, seniors, young students and vulnerable populations. The second case is 'Sonoscopia', a cultural association founded in 2011. Its mission has been to create a space where artists related to experimental, improvised and electroacoustic music can cross ideas and develop consistent work in a room that gathers technical and human conditions. This association's work spreads on multiple fronts: a) programming, b) creation, c) edition, d) education and research; e) residency programme – providing artists and scholars with the time, space and resources to work on researching and developing their practice. Sonoscopia's work targets different cultural facilitators, national and international musicians, researchers, young students and children.

João then presented the results of his team's investigations. They identified two distinct evaluation systems in the associations. PELE articulates different evaluation systems. First, using external evaluation teams (associated with funding bodies) or through protocols established with research centres. However, the association identifies some tension between the indicators highlighted in this type of evaluation and the dimensions and values favoured by PELE. Second, for the first time, PELE is exploring a new approach – the ongoing monitoring and evaluation of projects by members of the PELE team. The ultimate goal of this experience is to find an evaluation methodology that can be applied to other PELE projects.

On the other hand, Sonoscopia has an informal evaluation system consisting of internal evaluation between team members – a critical discussion about the work process (however, without a written record). In the case of activities that regularly involve other groups, the system is identical. The association is distancing itself from the need to implement a more formal evaluation system – the logic of informality on which the evaluation process is based is in line with the values of informality, horizontality and little bureaucratisation that underlie the whole association.

Regarding these results, João presented three recommendations. First, **an evaluation framework co-constructed by experts, institutions, and the people implicated in the projects must be developed**. Second, **to promote training in evaluation techniques within teams**. Third and finally, **ongoing evaluation frames and techniques that institutions can operationalise need to be developed**.

Then, Victoria Alexander gave an overview of the cases investigated by the Goldsmiths' research team. She first recalled the context in which cultural institutions evolved in the United Kingdom. This context is marked by the importance of Arts Council England (ACE), the arms-length body responsible for distributing funds to National Portfolio Organisations (NPOs). Funding is competitive, time-limited, and partial (plural funding model). NPOs are required to address issues of equality, diversity, and inclusion (EDI) as integral to the funding agreement – this has normalised EDI values across the supported arts sector. They are also required to set evaluation measures and provide reports and metrics to ACE ('externally driven evaluation'). The broader political context is marked by the government strategy of 'levelling up': diverting funds from London to the regions and austerity policies in neoliberal times, resulting in less funding for the arts (and other sectors).

In this context, Goldsmiths' team has investigated two NPOs. The first one is 'Gasworks', a small art organisation in Lambeth, South London (£290K per annum according to ACE (2023-26)) with connections to the Global South. Gasworks develops diverse locality programmes on emerging underrepresented artists (decolonised countries or non-normative identities). The second one is the Nottingham Contemporary, a museum that can be considered a medium-sized organisation (£1 million per annum according to ACE (2023-26)). The Nottingham Contemporary is targeting young audiences (50% below 35) in a university city and developing an experimental programme beyond the white western/male paradigm, seeing art as public service.

The main finding from the investigation of these two cases is that contemporary arts organisations accept and embrace external evaluation as a condition of receiving public funding but with several specificities or limits. First, evaluation occurs on many levels (Externally oriented, Internal, Co-created), and all are expensive in terms of staff time and other resources. Second, official (externally driven) evaluation, resting on metrics ('tick boxes'), is perceived as reductive and inadequate. It does not capture the complexity of organisations' work on EDI values. Third, internal, alternative, and co-created systems are developed. They are collaborative with employees, artists, local communities, and 'critical partners' (other funders, universities). Fourth, it stemmed from this exploration that an ideal system of evaluation would be co-created, conversational, flexible, and fully embedded in an organisation's activities and ambitions.

Victoria eventually presented four recommendations. First, since what gets measured gets managed, **pay attention to EDI outcomes**. Second, against a 'one-size-fits-all' approach, **to incorporate non-metric categories of evaluation** to capture fully the work and impact of different sized and oriented

organisations for a range of time horizons. Third, **to support organisations' efforts toward the creation of their internal systems of evaluation**, including co-created evaluation involving (potential) audiences, in order to generate a connection to communities and new ideas. Fourth, **to encourage (or even fund) evaluation partnerships** with external allies to develop more 'conversational' and 'reflective' systems of evaluation in order to generate richer data and new ideas.

***Policymakers' comments, by Maria João Mota – Coordinator of PELE, Cultural and Social Association in Porto***

Maria João described the situation of PELE, a small organisation from Porto that has been working since 2007. Since its creation, the idea of PELE was to approach the integration of groups and territories that are usually not a part of the participatory and creative processes and, by that, try to promote individual and collective change. The evaluation project carried out by PELE was born in a context where the idea of having external feedback was seen as the only way to support the concrete changes provoked by PELE's actions. Contrary to the UK case, the need for evaluation was because PELE felt it was worthwhile, not because it was mandatory.

Evaluation is essential to understand not only what but also how an organisation produces its actions and to question the power relations in the group. The evaluation also meets the need to speak the language of financers. Here is a limit because funders ask for quantitative evaluations while the PELE team asks for more qualitative approaches. Another issue is the demand for producing an impact on complex realities in the frame of short projects, sometimes without budget. Maria João agreed with all the recommendations presented previously, acknowledging the need for improving evaluation literacy as well as for developing peer collaborations.

## Session 3: Cultural strategic planning

**Chair:** Antonella Fresa – Promoter S.r.l– Eszter György – Eötvös Loránd Tudomanyegyetem

***UNCHARTED reflections and recommendations by Antonella Fresa – Promoter S.r.l***

Antonella Fresa started to bring to the audience's attention that the work presented in this third session, from WP5, has a different picture than the works discussed previously. The idea was to use experimental demonstrations to assess the results. The discussion of this session concerns cultural strategic planning, one of the three axes of WP5. Like other axes, the cultural strategic planning axis was articulated around a leading case and control cases. The general approach was to develop a model of valuation processes in collaboration with the stakeholders. The primary objective is to create a critical methodology for practices. The leading case of Volterra aims to study and demonstrate how the competition at the national level for the title of capital of culture represented the occasion for the city to reflect on the impact that cultural value can generate at social and economic levels, expanding

from the cultural dimension to the other areas of the civic life. The comparative cases are looking at the impact that the national competition for the European Capital of Culture produced in Portugal and how strategic cultural planning of local administrations can benefit from the experience carried out by United Cities and Local Government (UCGL) in the evaluation of city programmes in Europe.

For the case of Volterra, the first action was to create a group of stakeholders and then interview them. The second step was the administration of an online questionnaire to the Volterra inhabitants. The survey collected 224 replies. Eventually, a public event was designed, and some partners and experts attended it.

From these results, Antonella presented several recommendations. The stakeholders highlighted that it is necessary **to have long-term investments for special programs** that can continue after the implementation and not remain short-term experiences. They also highlighted the lack of participation of the youth in the process. How to involve the youth in cultural strategic planning programmes in the future will be another challenge. The results from the questionnaire survey showed **the importance of the ability to generate concrete changes to foster citizen participation**. All stakeholders have recognised that art is a resource for the community, but there is a need to use culture not only to boost tourist activities but also traditional crafts and **to preserve the authenticity of small cities as well**. Eventually, the project was also crucial for the area policies for triggering the expansion of the community in terms of political cooperation. Regarding these elements, **cultural strategic planning should be a way for stakeholders to reorient their views and methods**, especially taking into account the local context.

Eventually, Antonella asked three questions for the ongoing debate. First, who are the actors involved in cultural strategic programmes, and how can we improve the participation of broader actors and foster the democratic dimension of these programmes? Second, how can cultural values play a role in territorial development? How can classical and contemporary expressions work together in this ambition? Finally, what is the value of special programmes, and how can we evaluate this value in order to create trust in the capacity of investment in culture and creativity to change people and the economy?

*Debate, by Ulrike Meinhof – School of Humanities, University of Southampton – Neil Forbes – Coventry University – and Graeme Evans – University of the Arts London*

Ulrike Meinhof started with a question: What does participation actually mean? Participation is wanted at all levels, but the question is how do we implement it. The second fundamental question is the one of legacy and sustainability. For Ulrike, there are three phases in each project. The first one is the creation of the project itself in order to attract funding. The second stage is the implementation and evaluation phase. Then, the third and the hardest is the measurement of the impacts. In reality, the third stage has to be part of the first stage, which means that when you define the project, when you write a project, whether it is an academic project or whether it is a project at the ground level, actually to know who the people are, you have to know what the intended effects are. Unless you do

that, by the time of the end of the project, everything disappears. Thus, Ulrike pointed at the necessity, in all three phases, of co-creating at phase one what to be achieved in phase three and making sure there are people at phase three who will still be around to really carry it on. The universities have a significant role to play here because they are some of the few people who have the privilege of being funded and have some sustenance and sustainability.

Neil Forbes first discussed the award of the City of Culture to Coventry, which is a national national-based award. There were three anchor institutions in this process. There was the city council, and there were the two universities, the Coventry University and the University of Warwick. The award was won on the basis of a theory of change. Coventry is an exciting city in that it has very affluent areas and areas of significant deprivation. So, the consortium proposed the theory of change, but basically because the city council had excellent data on life expectations, health outcomes, literacy, schools, school education, qualifications, and household income. Neil highlighted here the necessity to find some measurable effect since the funders, at least in the UK, look mainly at metrics. Neil also mentioned the importance of language because language means different things to different people, for instance, about the question of cultural heritage.

Graeme Evans started by recalling that the notion of evaluation emerged pretty much directly from the notion of evidence-based policy, which was inspired by medicine, where evaluation rests on random trials. However, evidence-based policy in the real world, in society, and social and cultural settings does not really work that way since there is no such thing as pure control. Additionally, Graeme pointed out the dangers of comparing cases that are too different in order to reach a proxy for control.

Regarding participation, the narrow definition of planning in terms of land use, environmental sustainability, and infrastructure planning is dominated by professions of the planner's cultural planning. There is always a heavy consultation at the bid stage. Then, if the project is successful, the part goes off, and cultivation disappears. Participation may or may not be embedded. Co-creation is usually bandied about a lot of the time for collaboration. If that continues into the co-production, it is time to change the shift of power, and that does mean resources.

Nevertheless, it is challenging to achieve this sort of event-based approach because event-based regeneration is, by its nature, political. In order to foster participation, there is a need to know who is out there and to raise the question about the imbalance between the cultural institutions, the heritage organisations, the well-funded and the contemporary cultural groups. So, to do that kind of cultural asset mapping, which is a way of finding out who the cultural organisations are, we need to work with them.

Finally, Graeme put into question the growth of the discourses around the externalities of culture. Because if we look at participation in most of what we recognise as the arts and culture, indeed, in Europe, it has not really shifted since the 1970s. Despite all these cultural policy interventions, we still observe a divide between social and income and other groups. So, that does address the cultural value question, perhaps not being looked at as rigorously and robustly.

## Concluding remarks by Gábor Sonkoly and Arturo Rodríguez Morató

Gábor Sonkoly thanked all the participants, especially the policymakers and experts. The project is about to come to an end, but the publication of the results and recommendations is just beginning. It is essential to keep in mind that what the UNCHARTED project is proposing is something worthy of society but, at the same time, compliant with academic expectations.

About Volterra, Gábor said he was very much impressed by the involvement of the city in its own identity. Volterra is a beautiful case of how a city can rely on its power and the resilience of the reinterpreting of its past. Even though it was unsuccessful in becoming the Italian capital of culture, the city was not discouraged by the decision but took it as a kind of encouragement to remodel and reinterpret itself on the basis of its heritage. The Budapest example showed that what is also decisive in good governance is the personal involvement of those who are responsible for these different cultural projects. All the cultural institutions that we explore today can survive against their very hostile economic, societal and, of course, political contexts because there were persons who were very much involved. Thinking of all these different institutions, those personalities who keep the coherence and the continuity in the decision-making, Gábor thinks that we should really think about them and also how we can bring them to the surface when we talk about indicators of specific cultural projects. One of the main challenges for the project now would be to think about how to include the different scales that all case studies have proven to be relevant, from the European to the very local level, into decision-making, especially in cultural projects.

Arturo Rodríguez Morató once again thanked all the participants. He recalled that every policymaker's and expert's comment would be beneficial for the rest of the work done within the UNCHARTED project and especially for the policy roadmap within which the content of this policy seminar will be included. The quality of today's exchanges showed the relevance of the work achieved so far and illustrated that it relates to the preoccupations of practitioners outside the consortium.

Arturo expressed his wish to see these exchanges continue in the future and reminded all participants that in a few weeks in Barcelona, smaller meetings will be held to complement this one and develop some aspects that were not addressed during the policy seminar. Arturo said that other developments of this seminar's exchanges would take form after the end of the project, primarily through the academic publications that the consortium is currently working on. Arturo announced that another conference is foreseen in 2025, with all or most people involved in the UNCHARTED project, about the plurality of values of culture and the complexity of understanding and managing these values and the dynamics of their measurement.