



# UNCHARTED

Understanding, Capturing and Fostering the Societal Value of Culture



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## Introduction

UNCHARTED is a project funded by the European Commission's Horizon 2020 Framework Programme aiming to address the topic of the plural valuation of culture in Europe from both analytical and public policy perspectives. Faced with the predominance of an economic and market-oriented perspective, both in the social representation of cultural value and in cultural management and cultural administration, that unduly restricts the analysis of this issue with negative consequences for the public management of culture, this project tries to provide a broader vision of the societal value of culture in the European context, as well as practical cultural policy guidelines in correspondence with that alternative view.

UNCHARTED focuses on the practices of assessment and evaluation of the culture of different kinds of actors in their typical environments of action and adopts a comparative case study methodology. We distinguish three main areas and three types of fundamental actors in the value dynamics of culture: the field of cultural participation, in which citizenship is the protagonist; the field of cultural production and heritage, where the professionals of creation and preservation take the initiative; and the field of cultural administration, where the experts and politicians decide. The project takes these three areas and this basic typology of actors as a starting point to structure the study of the different aspects involved in this evaluative dynamic: the emergence of values, the configuration of a value order with their tensions and mitigations, and the political impulse of values.

The project has four main objectives:

1. The first objective is to examine the influence of a series of circumstances and critical factors in shaping the values of culture in Europe: gender and rising diversity; urbanisation and social and spatial segregation in cities; globalisation and digitisation; neo-liberalism; and the development of cultural policy in Europe.
2. The second objective is to identify the plurality of values that emerge in everyday activities within different areas of cultural practice (economic value linked to cultural innovation; public values such as creativity, inclusion, tolerance and cohesion; or personal values such as well-being or the promotion of identity and belonging)
3. The third objective is to understand the tensions relating to how different actors in the cultural field (citizens, professionals or public administrators) construct, measure, compare and rank the values they attribute to culture.
4. The final objective is to assess the strategies and effectiveness of cultural policy and cultural institutions in taking full advantage of the potential benefits of culture for society.

Firstly, taking a macro perspective, we have made a general exploration of the research literature and existing data on fundamental factors and circumstances that have influenced the configuration of the values of culture, those previously mentioned. These are significant social and technological transformations that have contributed to setting up the stage where cultural practices take place nowadays. It is the scenario in which the societal values of culture are

updated and structured in everyday cultural practices, enhancing some of them to the detriment of others or articulating with each other in a balanced way and even potentiating each other at times.

Secondly, adopting a micro perspective for the research of the topic and following a multiple case study strategy, we have worked on a broad set of case studies. The first group of studies covered a variety of cultural programmes, cultural institutions and cultural administrations where different cultural actors deal with values and valuations of culture in carrying out their usual activities. Through them, we have sought to achieve our second objective, elaborating a systematic comparative overview of the configurations of values and valuation processes that appear in the context of the cultural practices, discourses and representations of the different cultural actors. Then, another extensive set of case studies has allowed us to analyse the grammars and regimes of value that rule different areas of cultural practice, as well as the evaluation mechanisms that operate in them and the way that existing cultural information systems register different values of culture. As a result of those analyses, we have developed a general view of the conflicting dynamic of valuation across the cultural sphere, which was our third objective.

The last part of UNCHARTED addresses the practical aims of the project. On the one hand, we validate our previous analytical findings through several experiments and demonstrations carried out by citizens, professionals, administrators and policymakers in three institutional fields: strategic cultural planning, culture-led urban regeneration, and information systems. On the other hand, we also develop a comprehensive policy analysis of cultural administrations and public cultural institutions, in which we examine the coherence and impact of cultural policies based on another set of case studies.

This Roadmap re-examines the evidence and the accumulated elaborations of the whole project on the dynamics of the social emergence of the values linked to culture, the very complexity of the societal value of culture, and the effectiveness of cultural policy institutional configurations and strategies of action, in order to identify the cultural policy models and orientations that can best favour the promotion and full exploitation, in its intrinsic plurality, of the societal value of culture.

In the first section, we recapitulate the outlook produced throughout the analytical part of the project, which brings us to an end by outlining some essential dimensions of possible improvement in the public fostering of the plural values of culture that stem from our analysis. This sets the scene for the following sections. The second section presents five key challenges in promoting and better exploiting the plural values of culture in correspondence with the previously identified dimensions of improvement. Finally, in connection with the previous challenges, the third section presents a series of recommendations for cultural policy action based on our research results.

## Part 1: Main WP1-WP3 Lessons and Mapping

The first part of the UNCHARTED project delves into various factors influencing the formation of cultural values in Europe, such as gender and increasing diversity, urbanisation, spatial and social segregation, globalisation, digitisation, neo-liberalism, and the European historical and political experience. This exploration serves as a foundational reference for the entire UNCHARTED project, providing an implicit framework of general coordinates for cultural valuation.

We examined factors contributing to rising diversity and improved gender equality in European societies, analysing their impact on cultural values within institutionalised culture, cultural administrations, cultural policies, and citizen culture. We explored the influence of urban transformations, particularly gentrification and touristification, on cultural values. These two processes are considered relevant for the centrality and role that culture (along with the economy) has played in this process and its direct impact on preserving heritage and social and spatial segregation. We also investigated the effects of globalisation and digitalisation on cultural values, focusing on access, participation, and cultural production. We employed the REED (Resistant, Emergent, Established, and Dominant)<sup>1</sup> typology to analyse how neoliberalism has shaped cultural values in 30 European countries through the Council of Europe's 'Compendium of Cultural Policies and Cultural Trends.' Finally, we examined how the development of cultural policy has shaped European cultural values, identifying prominent value families such as democracy, identity, well-being, aesthetics, and economy.

Analysing these factors allowed us to identify today's main transformations of cultural value principles in Europe. In this sense, we highlighted a loss of centrality of the intrinsic values of culture (linked to the autonomy and independence of art) in favour of extrinsic values (linked to the instrumentalisation and use of art and culture for other economic and social purposes). This instrumentalisation of culture opens up a set of tensions between its social and economic purposes, which is reflected in the orientations of cultural policies but also appears at the centre of disputes in the urban sphere. Another aspect we identified is the effects of cultural globalisation on the homogenisation and uniformity of cultural values. However, we also observed a trend linked to the emergence, institutionalisation, and legitimisation of cultural diversity in specialised culture and cultural administrations as an opposite tendency. Finally, we identified tensions regarding unequal structures between the social agents participating in different cultural domains. These conflicts are interpreted as power relations that put dominant actors (marked by institutional position, legitimacy, and symbolic capital) with an interest in the status quo in opposition to less-dominant actors who have an interest in subverting these reference values.

The second phase of the project aimed to uncover the plurality of values emerging in cultural practices, examining actors, evaluative practices, and values across four domains: cultural

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<sup>1</sup> We employed the REED (Resistant, Emergent, Established, and Dominant) typology describing the different degrees to which cultural policy practice adapts to neoliberal parameters to analyze to what extent neoliberal values influence cultural policy in European countries.

production and heritage management, cultural participation, cultural administration, and cultural participation via new media. The research design employed a multiple-case study approach with 26 cases, exploring various thematic areas and countries.

The values identified within cultural production and heritage management encompass aesthetics, economics, participation, authenticity/identity, well-being/comfort/entertainment, technical efficiency, and sustainability. In cultural administration, identified values include authenticity/identity, economics, aesthetics, well-being, participation/democracy, sustainability, education, and equality. Cultural participation in live arts and culture is associated with values of participation (with socialisation as a critical aspect, where the process and the social form are more important than the artistic content), hedonism/entertainment, authenticity, and well-being. Emotions are a pervasive value that exists in all domains. However, cultural participation via new media is more predominant – together with pleasure and well-being – due to the ‘distance’ nature of the relationship with culture.

Moving beyond the plurality of values, predominant, transversal, and subsidiary valuations were observed by domain. In cultural production and heritage management, aesthetic and economic valuations were predominant. In cultural participation, hedonism, well-being, and democratic valuations were prominent. Economic valuations were central in cultural administration, emphasising excellence, innovation, and territorial growth. Aesthetics emerged as a transversal value across cultural production, heritage management, and cultural administration. Another valuation emerging in the fields analysed is linked to participation/democracy, which is particularly evident in the experiences of cultural participation (linked to direct participation, social integration of different types of audiences and publics) and cultural administrations (associated with the inclusion of other sectors in cultural activities or in the design and implementation of cultural public policies or actions that pursue social cohesion through cultural activities). In the field of cultural production, participation appears as a subsidiary value associated with the involvement and participation in decision-making in the creative and organisational processes of users and stakeholders. The valuation related to principles of authenticity and identity is another case of value transversality detected in the fields of cultural production and heritage management, cultural administration, and cultural participation. Sustainability arose as an emerging value in cultural production, emphasising harmony with the natural and cultural environment. Technical efficiency was a subsidiary valuation specific to cultural production and heritage management.

The valuations detected came into a set of tensions that characterised the value dynamics of the domains studied. Cultural production and heritage management tensions were observed between creation/design contexts (aesthetic, sustainability, authenticity, and participation) and project materialisation (technical, economic, and well-being). Cultural administration tensions included conflicts between aesthetic and identity values at national/regional levels and aesthetic and participatory values at the local level. Cultural participation tensions ranged from hedonism/entertainment versus institutional or authentic values to creative freedom versus market demands. Cultural participation via new media exhibited supportive heterarchies, lacking predominant value tensions. In cultural production and heritage management, tensions centred on aesthetics and economics. In contrast, cultural administration faced tensions between economic and aesthetic valuations at the national level and between participation and



aesthetics at the local level.

The third phase of the project aimed to understand the evaluative tools used by social actors in different fields, the emerging tensions, and their resolution forms. We identified four diverse systems of (e)valuation characterising the four topical areas in which our work in this phase is articulated: grammar in cultural consumption, technologies in cultural production and heritage management, methodologies in cultural administration, and systems in cultural information systems.

Cultural consumers-practitioners use qualifications to assess artistic expressions and cultural practices. These qualifications are based on implicit individual judgments, feelings, emotions, and appreciation. They organise themselves as grammars that allow for multiple valuations, combining value principles differently. In cultural production and heritage management, evaluation is characterised by a judgement mechanism: the attribution of value by a subject to an object. These judgements are crucial to expressing tensions in decision-making within cultural production and management processes. The evaluation forms analysed in the cases of cultural administration and information systems have elements of judgement (detected in the cases of cultural production and heritage management) but also of measurement, as they require various instruments such as codes or numbers to quantify things. Both evaluation regimes are characterised by being the most explicit and formalised ones, linked to expert opinion and accountability (methodologies) but also categorisations and commensuration procedures (information systems).

## 1. Variations in Valuation: Cultural Practices of Consumption

To understand cultural consumption valuation in practice, our case studies showed that three factors (content, habitus, and context) and three levels (internal/personal, external/social, or contextual/political) are essential. The combination of these factors and levels constitutes 'factories of values' based on coherences as well as tensions, dilemmas, or compromises experienced by individuals in the implementation of the practice. As a result of the spontaneous interplay of these different valuation principles, cultural participants' valuation in practice is far from being a formal evaluation and requires a qualitative and deeply contextualised analysis at a particular point in time.

The plurality of values expressed by cultural practitioners-consumers is thus generated within dynamic and interrelated webs of value-related factors. Among the most coherent values are those constructed with reference to the habitus since they are the translation of incorporating social, family, and cultural identity. However, they are likely to come into conflict with the value placed on practices by a context, anticipated or unanticipated. Similarly, the values associated with a context can be called into question by the process of valuation related to the content of a work. For example, if the context plays a role in social valorisation, the cultural practice that takes place there can be devalued because of its aesthetic, moral, or even political content. Similarly, the content of a work, for example, a type of dance or music, can turn out to be totally contradictory with habitus and yet, by the values attributed to it at the time, overturn the codes.

This complex framework of attributing value to participation in arts and culture constitutes a significant challenge that should be addressed in policymaking. Giving attention to how people qualify their involvement in arts and culture and the impact it has in their lives is critical to have a comprehensive view of the strength and roles that arts and culture can play in society and, thus, to design and implement policies more respectful of the plurality of values expressed in society.

## 2. Axial Tensions Between Actors in Cultural Production and Heritage Management Technologies of Evaluation

The plurality of values detected in the domain of cultural production and heritage management, as well as the complexity of the evaluation technologies used by the involved agents, pose significant challenges for cultural policymakers. In the case studies analysed in the domains of cultural production and heritage management, we identified tensions related to opposing valuations (i.e., integrity vs. economic development in cases of heritage preservation) or different interpretations of the same value (i.e., varying meanings of economic valuations in cases of cultural production).

These value tensions manifest themselves at different stages of cultural production or heritage management and often rely on the various technologies implemented by professionals in the field. These tensions tend to be latent in some cases and salient in others. The ways to neutralise these conflicts often involve polarisation or integration. Polarisation occurs when the value regimes underlying specific evaluative tensions are perceived and enacted as incompatible. Polarisation typically leads to the exclusion of the actor supporting one of the poles from the debate. Integration, on the other hand, occurs if some alignment between different value regimes is worked out by the parties involved, reframing conflictual situations into favourable terms so that different value regimes are no longer framed as oppositional.

These value tensions among professionals represent a significant challenge, both in terms of respecting value plurality and in the handling and management of the resulting value tensions by policymakers.

## 3. Evaluative Tool Tension in Cultural Administration Methodologies of Evaluation

The field of cultural administration deals with value tensions centred on evaluative tools and mechanisms. This distinguishes it from cultural consumption, where tensions vary by individual, content and context, and cultural production and heritage management, where tensions align with the interests of involved actors. In cultural administration, conflicts arise over the appropriate instruments for evaluating processes, institution performance (e.g., museums), and cultural projects (e.g., such as culture-led urban regeneration policies). Additional tensions involve discussions on suitable indicators (qualitative or quantitative) for measuring cultural sector performance at national or regional levels, city cultural activity, or museum performance.

At a more general level, however, tensions arise due to different evaluations of the same assessed element (aesthetic vs. social evaluations; aesthetic quality vs. entertainment or pedagogic relevance) or how evaluations should be carried out. In our study, we identified two evaluation methodologies within cultural administrations: bureaucratic ones and those based on expert evaluation. In bureaucratic-led evaluation methodologies, value tensions arise about the procedure between tendencies toward its standardisation or its diversification, between the use of qualitative or quantitative measures, or in its adaptation to policy changes. In expert-led evaluation methodologies, value tensions arise concerning the agency and proficiency of experts and the criteria they use, which can be more or less objective and transparent.

Based on this evidence, our analysis reveals numerous challenges for cultural administrations regarding the evaluation methodologies implemented. One of these challenges is finding appropriate measurement tools and procedures to evaluate the outcomes of the implemented cultural policies. This involves capturing the plurality of values existing in society and specialised cultural spheres and adapting the instruments to achieve greater specificity without losing the power of abstraction and generalisation. Another challenge is finding dialogue mechanisms among administrative agencies, institutions, and cultural organisations to develop evaluation methodologies that align more closely with the assessed realities.

#### 4. Evaluative Tool Tension in Cultural Information Systems

Similar challenges arose from the perspectives of cultural information systems and cultural observatories. These expert-sanctioned valuations enable a 'bird's eye view', providing broad but primarily flat and horizontal 'snapshots of reality'. The development and operation of cultural information systems depend on rationalised decisions that experts make about what to count and to classify. Such decisions are made with the goal of building a long-term perspective embedded in the process of refinement and adjustment to improve and better inform cultural policy over time. These systems are based on categories to capture the frequency of use of different cultural provisions. However, they are not intended to capture cultural values, even though some additional questions on 'interest' and 'active participation' do attempt to do so and are partially successful.

Despite some qualitative attempts in information systems, the fundamental tension between quantitative measurement and qualitative attribution of value remains. By adding specific survey questions, interview data, and focus groups, these cases intend to gain access to cultural consumers' and participants' explicit judgments. Still, they are a continuous challenge with unresolvable tensions due to experts' underlying economic-oriented conception of culture. Overcoming these results of valuation that reveal the lack of representativeness that cultural statistics inevitably entail is vital to inform cultural policies better. The implementation of participatory processes in cultural information systems, including valuations of cultural consumption, would help to translate democratising principles into cultural programmes. Both quantitative and qualitative approaches need to be articulated, reinforcing alternatives to the legitimated 'official' framework. These more comprehensive alternatives would help inform cultural policies more coherently and would take into account the plurality of values expressed

in society.

Overall, the data collected revealed the complex and multidimensional framework of attributing value. This complexity needs to be acknowledged and could contribute to the negotiation, implementation and development of more participatory processes (i.e., participatory initiatives, practices, measurements and organisational arrangements) that address the variations and tensions expressed in cultural consumption, cultural production and heritage management, cultural administration, and cultural information systems.

## Part 2. Challenges and Orientations Guiding the Roadmap

In order to formulate recommendations corresponding to the stages and objectives of a policy roadmap, it is first necessary to define the challenges to which we believe public authorities and cultural institution leaders must respond. These challenges stem from our investigations as part of the UNCHARTED project, and in particular those set out in the previous section of this policy roadmap. The consortium has identified them as crucial dimensions in the promotion and better exploitation of the plural values of culture in Europe.

Throughout our fieldwork, we have observed that they are the subject of a very high degree of discursive convergence among the public policy players, heads of institutions, cultural players and citizens we have met. This convergence is not a consensus. Discordant voices are being heard not only on the scope of the principles we are now going to specify but also on the methods and sometimes even on the political and social interests of these political challenges. This is why they are based on the researchers' reading of the results of 4 years of investigation and not on an unobtainable absolute objectivity.

The five challenges are to produce:

- Policies that are more respectful of the plurality of values expressed in society
- Policies that are more democratic
- Policies that are implemented in a more coherent way
- Policies that are based on improved evaluation methodologies
- Policies that rely on the most relevant cultural information system

We will now go into more detail.

### 1. Policies More Respectful of the Plurality of Values Expressed in Society

There is a contrast between the way in which cultural policies and institutions define the values on which their public action is based and the way in which citizens and cultural players value their social practices of culture. This contrast is linked to two main phenomena: a heterogeneity of values and divergences in the hierarchisation of these values. On the heterogeneous side, some of the values that citizens attach to their cultural practices are virtually absent – as values – from the discourses and policies of public authorities. This is true of the value placed on cultural practices in terms of hedonism/well-being (physical and psychological) and, to a lesser extent, also in terms of social and political inclusion through participation and social and gender equality in access to cultural responsibilities. The heterogeneity here consists in noting that these aspects are considered as consequences for the public authorities and not as values from which objectives and intervention criteria would derive.

In contrast, for citizens, it is precisely the values that are at the origin of their cultural practices.

For cultural professionals, on their part, aesthetics and professional excellence are of paramount importance, usually more so than for citizens and public administrations. This double hiatus, most often ignored by cultural policies, might not be a problem if supply-side policies, based on three central 'umbrella' values (aesthetics, social access, societal bildung), really had the effect of enshrining the values attributed by citizens and cultural professionals to their practices. However, this is far from being the case, and so it constitutes a challenge.

If this is not the case, it is because, alongside the heterogeneity of valuation between political supply and social demand, there is a discrepancy in hierarchy. We saw this when we examined the values on which cultural policies are based. While all the public authorities agree on the triptych of values of aesthetics, social access, and social bildung, they do not necessarily give them the same priority. Aesthetics is most often the first value for national policies, whereas social access and societal bildung are more central to the policies of regional and local authorities. Added to this initial tension are the controversies surrounding the actual content of each of these values, depending on the level, country and sector in question. However, above all, instrumental values are more and more integrated into the political agenda for culture in the name of the economy, environmental sustainability or tourism development. Sometimes, in the official discourse, these instrumental values do not appear as values pursued for their own sake.

Nevertheless, they are continually generating decision-making criteria that are pervasively present in public policy instruments. Their increasing influence raises tension with respect to cultural professionals and puts cultural sustainability at risk. These tensions (between fundamental values, within each of them and with instrumental values) constitute a challenge for cultural policies. They must, therefore, be the subject of a definition of a political trajectory in the policy roadmap.

## 2. More Democratic Policies

Throughout our research project, the democratic issue has appeared to be both widespread and problematic. It is widespread because, with the exception of certain countries such as Hungary, which evokes the oxymoron of 'illiberal democracies', it is in the name of the participation of culture in democratic development that cultural policies are justified. The three values of the triptych make direct reference to this: Aesthetics presupposes a democracy that guarantees the autonomy of artists; Social access presupposes a cultural policy based on a principle of equality in law and, in fact, societal bildung implies that the value of culture lies in its capacity to create society in and through the diversity of its members.

However, this link between culture and democracy is also problematic. On the one hand, contrary to our expectations, the values we are talking about are very rarely made explicit in the implementation of cultural policies. Nevertheless, democracy, over and above aesthetics, equality and societal constructivism, is also a system founded on the principle of publicity and deliberation. The fact that the values on which cultural policies are based are evoked implicitly represents a danger to the very effectiveness and legitimacy of public policies. If deliberation necessarily involves arbitration between antagonistic visions of the relationship between culture and society, it would be wrong to protect ourselves from conflict by silence. Reintroducing

democratic debate on values is, therefore, a first challenge for European cultural policies.

On the other hand, there is an unresolved debate between two visions of the relationship between democracy, culture and society. On the one hand, democratisation proposes to build this relationship on the basis of a supply-side policy, which society takes hold of through its practices, with all the sociological limitations that reduce the scope of the promise. On the other hand, cultural democracy or cultural rights propose to start from the values expressed by social practices in order to develop a philosophy of empowerment and social and cultural exchange through demand, with all the limits represented by the demagogic and/or commercial manipulation of the notion of social demand. The second democratic challenge is to establish this debate within a collectively legitimate and enlightened framework.

### 3. Policies Implemented in a More Coherent Way

There is a paradox in the issue of coherence. On the one hand, the governmental imperative makes the coherence of public action a principle of its effectiveness and efficiency. The challenge, in the face of interpretative tensions, hierarchical misalignments and heterogeneity between politics and society on the values of culture, could, therefore, be to decide in favour of aligning all these players on the same principles, hierarchies and logical links between supply and demand.

This vision of the coherence of cultural policies must be rejected for two reasons. The first is that there is no democratic reason to justify the superiority of one value over another, to impose the correct interpretation of one of them or to validate one set of values to the detriment of another. The second reason is that cultural policies, unlike other sectoral policies, are not based on precise and successive paradigms but on paradigms that build on each other.

Consequently, at the level of values, a cultural policy is always a compromise between heterogeneous visions that combine aesthetics, social access, cultural rights, the creative economy, social identification through culture, and so on. In a democratic system, this compromise has an integrative value that prevents it from being aligned with specific interests or particular visions. Non-democratic regimes, moreover, all tend to cling to a golden age, a kind of pseudo-coherent identity, a mistrust of creativity. A certain level of incoherence in public action can, therefore, be seen as a democratic necessity.

However, policies need a certain level of coherence if they are not to be swept away by inter-sectoral and governmental regulations. The challenge of coherence can, therefore, be expressed as follows: to base cultural policies on a stabilization – always provisional – of values in tension.

### 4. Policies Based on Improved Evaluation Methodologies

Evaluation tends to become both a standard and an instrument for legitimising public policies in democratic societies. Still, in the case of cultural values, it is, first and foremost, a political process in which values are continuously recreated and negotiated. In cultural policy, evaluation

is central and ubiquitous. It is critical in the recruitment of technical personnel, in decision-making processes regarding grant-making, and in managing intervention processes and cultural facilities, for example. Additionally, the impact of cultural policies on society is also subject to evaluation. All these different dimensions of evaluation entail challenges.

A significant challenge is how cultural administrations incorporate the plurality, tensions, and value hierarchies existing in different cultural domains into their evaluation methods. This task necessitates maintaining a constant relationship with agents directly and indirectly involved in the measurements conducted. The evidence from the UNCHARTED project underscores the importance of engaging in dialogue with the agents involved to construct methods that are more suited to the diverse value realities under evaluation and intervention.

Sometimes, recipients of support by cultural administrations are formally detached from them, as usually happens in grant-making mechanisms for independent cultural producers. In these cases, there is no direct dialogue between evaluators and those evaluated, and there is a challenge in getting legitimacy that depends on the transparency of the arms-length mechanisms for selecting juries, the actual experts' reputations, diversity, and the rate of change. This relies on an indirect dialogue with the cultural sector.

Direct dialogue between cultural administrations and recipients of support becomes central in the case of cultural institutions, be they independent cultural institutions or institutions that belong to those administrations. In both cases, this dialogue constitutes a significant challenge. It gives rise to differences of interpretation and even conflicts of definition concerning the values of cultural public action: these differences sometimes lead to a mutual lack of understanding of what should be evaluated and how it should be evaluated; for example, as our studies of cultural institutions have shown, actions that are inclusive in the eyes of some may be described as exclusive by others. The remarkable diversity of cultural institutions compounds this first problem in terms of their links to cultural administrations, their legal status, economic resources, internal structure and objectives. In fact, the evaluation grids or, failing that, the activity reports imposed by the administrations that fund them are often perceived as ill-adapted by the institutions. The rigidity of the evaluation grids - the 'one size fits all' approach - was described in our surveys as an administrative constraint. This lack of adaptability also leads to a general disregard for the specificities of the actions developed by cultural institutions and an underestimation of their actual impact on their environments. Thus, the evaluation procedure becomes a fundamental issue under debate, too, as well as its scope and capacity to adapt to diversity and change. In this context, a dispute arises between the implementation of quantitative methods of reporting the performances of cultural institutions, preferred by administrations, or qualitative methods, more often claimed by institutions. To the extent that evaluation uses to be imposed by administrations, quantitative methods tend to predominate, but they are usually combined, too. The real challenge lies in how these instruments are conceived and articulated with each other.

The dialogue between administrations and institutions is ultimately a challenge in view of the lack of resources, which characterises the economic reality of many structures and constitutes a significant brake on the development of appropriate and systematic evaluation. In a context where, moreover, the outsourcing of evaluation - by academics or private firms - is proving difficult not only for these economic reasons but also for reasons of mutual incomprehension,



the training of teams within institutions in evaluation techniques is becoming a decisive issue. However, evaluation in this context is not only a technical issue but a political one, too. In this respect, the challenge is also how to incorporate end-users into the evaluation and how to combine providing legitimate political orientations for cultural institutions and preserving cultural autonomy at the same time.

Another kind of challenge concerns the evaluation of the impact of cultural policies. This impact is difficult to assess for several reasons. Firstly, because it concerns objectives that are themselves difficult to measure, and also because the effect itself is often indirect. Nevertheless, the main difficulty relies upon the fact that cultural evaluation is performative: it reveals, transforms and generates values. Therefore, the fundamental challenge in this regard is to address the evaluation of the impact of cultural policies as a permanent reflection and dialogue with society, for which cultural information systems are essential.

## 5. Policies That Rely on the Most Relevant Cultural Information Systems

Cultural information systems are now one of the fundamental foundations of democratic cultural policies. Through increasingly complex and eclectic methods, they constitute a decisive tool for understanding the forms of cultural participation and action of civil society and professional players. This tool makes it possible to guide public decision-making and to communicate with and inform all those involved in culture, from technicians and specialists in public action to producers and receivers of cultural offerings.

Here again, thinking about cultural information systems raises a number of challenges.

The first challenge in question has to do with the complexity of these systems, which encompass not only National Statistical Institutes and Eurostat but also Cultural Observatories of different scopes -national, regional, local- and sometimes devoted to specific fields -audiovisual, heritage, etc., besides many other data providers, such as Professional and trade associations or Rights management bodies and unions. Both cultural administrations and cultural institutions of different kinds are also essential parts of these information systems, and their interaction within the framework of the deployment of cultural policies that link them poses specific challenges.

Public authorities, whatever their level of intervention, are poorly trained in evaluation and rarely have the appropriate tools to measure the concrete results of their policies. In the vast majority of cases analysed, these tools are limited to quantitative indicators, which are often incomplete and imprecise and which the authorities do not necessarily control: they are, in fact, produced by the cultural institutions themselves, about their audiences, their actions and their teams. This reality gives rise to a twofold contradiction. On the one hand, it leads to inequality in the production of information, which is often produced by the most integrated institutions, those with the most resources. On the other hand, while government departments are, to some extent, able to assess what cultural institutions produce directly on their territory, they are inefficient at measuring what these institutions produce indirectly and what they do not produce. For example, the question of the take-up of cultural facilities, a fundamental issue in the context of cultural democratisation and democracy, remains a central blind spot in cultural policies in

Europe. The evaluation indicators available to government departments are, therefore, doubly biased.

A second challenge concerns the adaptability of information systems in general. In Europe today, these systems are essentially based on quantitative indicators. Without calling into question the usefulness of an approach that makes it possible to objectify the reality of cultural practices, our approach centred on the question of values, which raises questions about the possibility of providing information about quality using exclusively quantitative tools.

Another challenge is the transparency and accessibility of the data produced by these information systems. This requires not only the availability of survey results via the development of open data but also the collaboration of cultural players in the development of information systems. The aim here is to facilitate the cooperation between government departments and the academic world in order to give the tools scientific validity but also to ensure that their development and dissemination is not just a bureaucratic, top-down process by involving all the players involved in the various phases of constructing and implementing public cultural action.

Another major challenge for cultural information systems is to ensure that they are cross-disciplinary. The studies we have carried out show that there is a significant need to improve these systems so that they incorporate the analysis of practices outside the cultural field. This would involve linking information on cultural practices more explicitly to information on social or political practices. The data currently available, because it is too focused on the cultural domain, makes it difficult to establish the intersection between cultural practices and political participation, civic engagement or community involvement.

Finally, the last challenge is that of comparing tools and data from different administrations on a European scale. Data is currently produced within a national statistical framework that makes international comparison difficult. Encouraging dialogue between national administrations and improving the comparability of information systems is, therefore, a significant challenge in producing a general vision of cultural actions and practices on a European scale.

## Part 3. Recommendations

### 1. Enhancing Value Coherence, Governance, and Accuracy in Cultural Policies

#### 1.1. *Enhancing Value Coherence*

##### 1.1.1 The Cumulative Valuation of European Cultural Policies

Historically, cultural policy valuation has evolved according to political and administrative shifts, significant social changes, and evolutions of the cultural professional field's dynamics. This evolution mainly proceeds by 'accumulation' rather than by 'displacement' or 'conversion' – the new values being added to the old ones without replacing them. Among different lexical fields of cultural value justification, we can distinguish the following value clusters: aesthetic (beauty, excellence, quality, creativity, freedom of expression, or the autonomy of culture); equality (access, democratisation, education, or decentralisation); social cohesion (bildung, social link, community, inclusion, or heritage); diversity (democracy, multiculturalism, identity, dignity, or cultural rights); well-being (emancipation, hedonism, health, or entertainment); economy (soft-power, employment, growth, competitiveness, innovation, or attractiveness). The relative weight of these groups of values varies significantly from one administration to another, and most values are intertwined.

##### 1.1.2 Democratically Resolving Value Conflicts With Transparency

Numerous incoherences appear through the accumulation of values, making contradictory principles coexist (aesthetic versus democracy or well-being; equality and diversity versus economy). Some values are 'incommensurable' references between themselves - all the more when they are not translated into objectives. This can create conflicts between very different, non-comparable and irreconcilable scales of values. It is difficult to debate democratically in a field of many vague values. When it comes to implementation, this can lead to counter-productive effects without a clear vision of how the values are prioritised or what they imply in terms of practical, material and real consequences. It may be argued that conflicts of values are healthy in a democratic society and that conflicting values should coexist. However, for this debate to be transparent, the values need to be clearly defined, not reduced to rhetorical discussions. Conflicts over instruments and strategies must be based on explicit hierarchies of values.

- ⇒ **Recommendation 1:** Value definition, hierarchisation, and contradiction should be debated, defined, and solved in transparent public debates.
  
- ⇒ **Recommendation 2:** Value conflicts must be anticipated and democratically resolved by prioritising principles of action and clarifying value's strategic implications and expected impacts.

### 1.1.3. Ensuring Value Performativity and Effectivity

Officially promoted 'values' are often declarative and symbolic, without associated definitions nor details about the compromise and hierarchisation implied by their potential contradictions, and without specifically dedicated instruments or resources. This lack of clarification and definition greatly diminishes their effective influence. Cultural policy evaluation reports, when they exist, often valorise 'coherence' without any tangible proof relating impacts to values. Many values need detailed definitions to become effective and avoid having null, inconsistent or counter-productive effects:

- 'Diversity': of which cultures, which aesthetics, which social groups? The vagueness of its definition leads to policies with an impoverished diversity of productions and audiences.
- 'Equality', 'social access', and 'social cohesion': for which social groups, for what kind of 'access'? The over-representation of populations with high cultural and economic capital among the audiences of cultural institutions should be considered as an alarming incoherence demanding changes in implementation strategies.
- 'Common heritage': what is shared, whose culture, for whom? How do we consider the diversity of heritages?
- 'Democracy' and 'participation': who participates, to what, with what power over decisions? Is participation simply a matter of attendance, or is it an ambition to share decision-making democratically beyond the cultural elites?
- 'Cultural rights': Which concrete implications are there in terms of a bottom-up approach, recognition of cultural dignity, identities, and communities, in terms of the right for everyone to have the means to practice their culture and share it with others?

- ⇒ **Recommendation 3:** Value performativity and effectivity in policy implementation and policy impacts require a detailed value definition in concrete terms (translation into objectives, instruments, and qualitative impact indicators).
  
- ⇒ **Recommendation 4:** An enforceable right to legally report or condemn the non-effectiveness of values could be imagined, making it possible to confront the implementation and results of objectives and values.

#### 1.1.4. Designing and Assessing Instruments According to Values

Values and instruments look as if they are evolving in two parallel, unrelated worlds with different dynamics. In some cases, values are defined as ‘a posteriori’ in order to justify instrumental choices giving a non-democratic appearance of coherence. The debate about instruments is rarely linked to the discussion of values, often making instruments contradictory to values: most cultural policy instruments produce an unequal allocation of resources and exclusionary effects affecting diversity and equality, inconsistent with the values advocated. As instruments are defined as the result of constrained choices (legal frameworks, path dependency, political clientelism, reduced resources), it restricts the scope of the democratic and political negotiation to minimal segments of possibilities and alternatives without the significant principles of valuation being able to guide the discussion on the basis of an ‘ideal’ or ‘superior’ principle of action. Often requiring technical skills, the negotiation of instruments is also restricted to insiders (politicians or professionals), fostering the risks of corporatist interests and limiting the breadth of a debate that should be open to all citizens.

- ⇒ **Recommendation 5:** Instruments must be designed, evaluated and transformed according to values, taking care of artistic freedom, equality, diversity and other claimed values.
- ⇒ **Recommendation 6:** The definition of cultural policies should rationally follow the logical chain ‘values > objectives > instruments’ in order to ensure overall coherence and respect for democratically chosen political principles over technical and professional interests.

#### 1.1.5. Allocating Resources According to Values

Most values, if pushed to their consequences, would lead to ambitious policies (for example, the possibility for everyone to practice an art; the possibility for everyone to have access to the means of production and diffusion; the protection of heritage without discrimination; the representation of every culture and subcultures in the public institutions, etc.). However, cultural budgets are often very limited - and this leads to the choice of drastic competition between cultural actors, with strong exclusionary effects. Project promoters on the ground are often caught between overweening objectives and minimal resources. This lack of resources has negative impacts on creative freedom, diversity, equal access, heritage protection, and the economy.

- ⇒ **Recommendation 7:** Cultural policies aiming to be coherent with the values they advocate should allocate corresponding resources that will enable them to be effectively implemented. The discussion of values should not be based on a lack of resources seen as ‘inevitable’; it is a matter of political choices.

**Table 1. Summary of Recommendations on Enhancing Value Coherence**

<i>Dimension</i>	<i>Key research outcomes</i>	<i>Core recommendations</i>
Evolution of valuation	Cultural policy valuation evolves through political shifts, societal changes, and dynamics in the cultural field. It accumulates values (aesthetic, equality, social cohesion, diversity, well-being, economy) without displacement or conversion.	/
Democratically resolving value conflicts	Incoherences arise with accumulated values, leading to conflicting principles.	Transparent debates are needed for defining, prioritising, and resolving conflicts in public forums.
Ensuring value performativity and effectivity	Officially promoted values lack clear definitions and associated instruments, diminishing their impact.	Detailed definitions are required for values like diversity, equality, and democracy to avoid counter-productive effects.
Designing and assessing instruments according to values	Values and instruments often evolve separately.	Instruments should be designed and assessed in alignment with values to avoid contradictions and ensure coherence in cultural policies.
Allocating resources according to values	Limited cultural budgets lead to competition among cultural actors.	Policies must allocate resources corresponding to advocated values, addressing the challenges of creative freedom, diversity, and equal access.

## *1.2. Governance and Accuracy in Cultural policies*

A comprehensive policy roadmap on governance and accuracy is proposed in light of UNCHARTED findings. Key recommendations include emphasising inclusive governance, addressing illiberal tendencies, refining cultural policy models, tailoring governance to local contexts, and balancing marketisation and participation. Implementing these strategies aims to foster a more inclusive, participatory, and compelling cultural policy landscape across diverse national contexts in Europe.

### *1.2.1. Addressing Top-Down Governance Dominance*

In analysing governance and social accuracy in cultural policy across various countries, our comparative analysis reveals a consistent preference for a top-down governance model.

Moreover, a significant limitation arises in the insufficient involvement of professional actors, especially those on the periphery. Variations influence this deficiency in the political culture of the studied countries. Notably, the Norwegian cases demonstrate a higher level of consultation due to the organisational ability of professionals in the cultural sector, rooted in Scandinavian social democracy. In contrast, France exhibits a lower level of consultation, driven by the fragmentation of its cultural sector, fostering an individualised relationship with public authorities and reinforcing a vertical decision-making structure.

⇒ **Recommendation 8:** Promoting inclusive governance: Advocate for mechanisms that actively involve professional actors at all levels of decision-making and encourage cultural sector organisations to collaborate and organise themselves, fostering a sense of collective participation.

### 1.2.2. Spotting and Challenging Neo-Authoritarian Dynamics in Cultural Governance

The first substantial divergence in our comparative analysis revolves around the contrast between liberalism and illiberalism. In liberal regimes, though the participation of professional actors in decision-making may be somewhat limited, it lacks the explicitly exclusive logic observed in illiberal regimes like Hungary, where groups opposing cultural policy values are intentionally marginalised.

⇒ **Recommendation 9:** Addressing illiberalism: Public institutions should develop policies that counter explicitly exclusionary logic, ensuring a more inclusive approach to cultural policy values and establishing safeguards against the deliberate sidelining of groups opposing hegemonic cultural policy values.

### 1.2.3. Tackling Cultural Policy Model-Based Protocols Harming Value Plurality

Examining cultural policy models constitutes the second discernible component, elucidating variations in dialogue and consultation among liberal bloc countries. Based on our results, such openness dynamics and levels may be part of historical models in state administration of culture. The Architect model countries exhibit inertia in governance modes due to persistent vertical logic and weak consultation bodies. In Patron model countries, while the consultation is better integrated, it tends to result in similar exclusive logic unfavourable to peripheral actors. A noteworthy constraint is identified in the 'arm's length' principle, which, although avoiding negative perceptions of clientelism, may hinder the integration of actors not meeting criteria tied to artistic and economic excellence.

⇒ **Recommendation 10:** Considering models of cultural policy: Reevaluate cultural policy governance dynamics from the perspective of Architect and Patron models, aiming to mitigate their respective limitations, and consider modifications to the 'arm's length' principle to strike a balance between avoiding clientelism and promoting the integration of diverse actors.

#### 1.2.4. Understanding the Impact of Cultural Policy Decentralisation and Marketisation

Decentralisation and marketisation do not appear to impact governance and social accuracy significantly. Consultation tends to be higher at the municipal level, except in France, unlike Spain and Norway. Interestingly, the United Kingdom, with advanced marketisation, demonstrates high participation at the national level. In contrast, where marketisation is established, Portugal and Spain display lower participation levels.

⇒ **Recommendation 11:** Tailoring governance to local contexts: Recognise the impact of political culture on decision-making, tailor governance structures accordingly and implement context-specific decentralisation strategies to enhance consultation processes.

⇒ **Recommendation 12:** Balancing marketisation and participation: Foster a critical approach to marketisation, acknowledging its impact on participation levels and exploring strategies to balance economic considerations and cultural policy governance's inclusivity.

#### 1.2.5. Social Accuracy as an Increasing Challenge

We define social accuracy in cultural policy as the relative capacity of local, regional, or (supra)national policies to represent dominant value hierarchies within specific fields. The study highlights the complex interrelationship between cultural policy design and societal values. At the local level, cities like Bergen, Barcelona, and Montpellier prioritise equality, democratisation, and cultural rights. While Bergen and Barcelona stimulate bottom-up interventions, Montpellier faces challenges in adequately representing cultural actors. Regionally, Galicia aligns with a conservative orientation, while Vestland and Occitanie reflect a more pluralist national cultural policy. Central governments, following diverse models, reveal variations in the implementation of cultural programs and explicit components. Overall, the research finds that social accuracy aligns with a predominantly top-down approach across countries detailed above, presenting challenges to inclusive policies. While participatory dynamics are limited, the need for inclusivity is more recognised at the local level.

⇒ **Recommendation 13:** Inclusivity promotion: Advocate for policies that balance the predominantly top-down approach with increased inclusivity and implement



measures to enhance participatory dynamics at all levels, ensuring diverse voices are heard in cultural policy decisions.
⇒ <b>Recommendation 14:</b> Capacity building for participation: Invest in capacity-building programs to empower less privileged actors at all levels and promote educational initiatives to enhance knowledge and capacity for accessing cultural policy resources.
⇒ <b>Recommendation 15:</b> Continuous monitoring and adaptation: Establish mechanisms for continuous monitoring of social accuracy in cultural policies and ensure that these policies are adaptive and open to refining policies based on evolving societal values and needs. <ul style="list-style-type: none"> <li>• Local level emphasis: Encourage cities to adopt strategies like Bergen and Barcelona, stimulating bottom-up interventions for better representation.</li> <li>• Regional policy re-alignment: While recognising the alignment of regional cultural policies with national orientations, as seen in Galicia, Vestland, and Occitanie, policy actors may encourage regions to align policies with national pluralist cultural orientations to foster inclusivity.</li> <li>• Central government variation: Tailor policies based on diverse models, considering the need for both top-down and inclusive approaches.</li> </ul>

**Table 2. Summary of Recommendations on Governance and Accuracy in Cultural Policies**

<i>Dimension</i>	<i>Key research outcomes</i>	<i>Recommendations</i>
Promoting inclusive governance	Comparative analysis shows a consistent preference for top-down governance, limiting the involvement of professional actors.	Advocate for mechanisms involving professionals at all levels, fostering collective participation.
Addressing illiberalism	Liberal regimes exhibit limited participation, while illiberal regimes intentionally marginalise opposing groups.	Counter exclusionary logics in illiberal regimes for a more inclusive approach to cultural policy values.
Tackling model-based protocols	Different cultural policy models exhibit variations in dialogue and consultation.	Assess the effects of Architect and Patron models and strike a balance to integrate diverse actors effectively.
Understanding decentralisation	Decentralisation and marketisation vary in impact depending on the specific government level and ideology.	Tailor governance structures to local contexts, implement context-specific decentralisation strategies, and balance marketisation with inclusivity in cultural policy governance.
Managing social accuracy challenges	Social accuracy, aligning with top-down approaches, poses challenges to inclusivity.	Advocate for policies balancing top-down approaches with increased inclusivity, enhancing participatory

		<p>dynamics at all levels in cultural policy decisions.</p> <p>Invest in capacity-building programs, empower less privileged actors, and promote educational initiatives to enhance knowledge and capacity for accessing cultural policy resources.</p> <p>Establish mechanisms for continuous monitoring of social accuracy in cultural policies, ensuring adaptability and refinement based on evolving societal values and needs.</p> <p>Encourage cities to adopt strategies stimulating bottom-up interventions for better representation. Tailor policies are based on diverse models, considering the need for both top-down and inclusive approaches at the central government level.</p> <p>Recognise regional alignment with national legal frameworks and encourage regions to align with national pluralist cultural orientations for inclusivity.</p>
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## 2. Investigating and Implementing Coherence in Cultural Administrations

A central question for WP4 in the UNCHARTED project was whether there are systematic differences between cultural policy values and the practical implementation of cultural policy. This question deals with the level of coherence and/or incoherence that we might identify when we hold the explicit and implicit values of cultural policy up against actual policy practice. Furthermore, this WP has also been concerned with how the coherence between values and implemented policies might be increased. For this to be possible, however, we need to identify and analyse incoherences, as well as discuss to what extent these can be mitigated through well-informed policymaking.

Firstly, what do we mean by incoherence? According to traditional dictionary definitions, incoherence is ‘the quality or state of being incoherent’, while incoherent is, i.e., ‘lacking orderly continuity, arrangement, or relevance’ and ‘lacking cohesion’. In our context of cultural policy,

we understand incoherence as a lack of consistency between explicit cultural policy values and the actual, practical, and factual policy – in support of measures, priorities, organisation and administration. Put in fundamental terms: do policies let the values they are based on guide their actual politics?

Another essential question that merits a short comment is whether such incoherence necessarily represents a problem or not. Is incoherence always a bad thing, and is it at all avoidable? We might see that incoherence, in a slightly paradoxical way, can be a productive force. It can create a need to refine, specify and concretise what we mean by the different values used to legitimate varieties of cultural policy. Policies tend to evolve through discussion and debate. It is not necessarily a good sign that everyone agrees on everything.

At the same time, we would argue that it indeed is sensible and essential to strive for a certain level of policy coherence. Among other things, this is related to the legitimacy and trustworthiness of cultural policies. Both within a political system and towards the general population, policies that do what they say, mean what they do, and say what they mean are highly beneficial for the legitimacy of such policies.

## 2.1. Types of Incoherences

Through our case studies, we have identified several kinds of incoherence. The five most important ones are summarised in Table 3. We will expand on these shortly below.

**Table 3. Main Types of Policy Incoherences: Explanations and Examples From Case Studies**

<i>Incoherence</i>	<i>Explanation</i>	<i>Example</i>
Political priority and actual politics	Incoherence between what is an explicit priority and what is prioritised	Funding large-scale institutions at the expense of cultural democratisation and grassroots activities (Galicia)
Economic/funding	Incoherence due to lack of funding to back up political values	General incoherence in most cases
Conflicting value conceptions	Different interpretations of the same value	The value of freedom (France) or autonomy (Norway)
Political values vs. governing structure	Incoherence between stated policy and an administrative apparatus in place to effectuate policies	Relative lack of cultural administration (Montpellier)
Emerging value (yet) not implemented	Value acknowledged as essential, but yet with no impact on implementation	Green transition, sustainability (Norway)

1. Political priority and actual politics: This incoherence is a general kind of inconsistency that we most likely find in every imaginable variety of cultural policy. It represents the primary problem for every policymaker and politician alike, namely that it is challenging to fulfil everything that you have promised to do. In that way, it is a rather unsurprising kind of incoherence identified in a number of our cases, at the same time as the practical reasons behind the lack of coherence might differ.
2. Economic/funding: This is also a general, omnipresent kind of incoherence relevant to all or most cases analysed. Although the values and priorities seem aligned, there is a lack of funding, austerity policies, budget cutbacks or similar, making it difficult to back up the priorities with actual policy measures that have an impact.
3. Conflicting value conceptions: This kind of incoherence is at a more conceptual level, but within the field of cultural policy, concepts are critical vehicles for actual politics. Concepts have agency. At the same time, key concepts tend to be interpreted in ways that are not consistent. A good example is different ideas on how to implement the general idea of freedom in cultural policies.
4. Political values vs. governing structure: There is also a potential incoherence between explicit policy and policy values on one hand and an adequate governing structure on the other hand. In general, there is no doubt that a well-staffed, operational and competent bureaucracy is instrumental in the implementation of cultural policies.
5. Emerging value (yet) not implemented: Finally, we can also see that specific policy values, while being acknowledged as necessary, have not matured to the stage where they have practical consequences for the implementation of policy. These are emerging values, and an essential example of this is the value of sustainability. This value is universally acknowledged, also within the sector of cultural policy, but with relatively few policy measures being based on it.

## *2.2. Comparing European Cultural Policies and Their Incoherences*

Across the different cases and countries, we see that it is challenging to compare the cultural policy (in)coherences across countries. There are essential differences between the various cultural policies covered in our different case studies. The differences are related to the actual organisation of policy responsibilities, the scope and content of the different policies, the priorities of cultural policies, the recent development of these, and, to some degree, also the explicit values of these policies.

At the same time, we also see that the level of coherence is different between the represented countries and that there are several potential explanations for this. These are related to differences in the general level of cultural policy consensus, the accessibility of explicitly stated values (in political documents and strategies), the lack of transparency, and whether there are bureaucrats and a governing structure in place to carry out the different policy implementations.

In general, we see that there are both external and internal explanations for the identified incoherences. The external has to do with factors like the economic situation of the country, the

dominant political system and ideology, and also with the cultural policy model that the case countries represent. Economic and budgetary constraints are a constant theme in the implementation of cultural policies in Europe. Culture is generally a secondary or low-priority sector of public policy, leading to potential contradictions with programmatic ambitions. The actual weight of budgetary constraints varies across cases and is highly dependent on the economic situations specific to each country.

At the same time, another general or external explanation of incoherence might be at play here – the sheer pragmatism of politics. There is a principal incoherence between policy principles and political practice. Politics is hugely pragmatic by nature, which includes compromises, negotiations and logrolling on a day-to-day basis. This will necessarily affect the level of coherence between programmatic values and actual cultural policy implementation.

The internal explanations of incoherences (and coherence) are related to the organisation and collaboration of the different agents and actors of cultural policies. An essential factor in explaining how consistent the different cultural policies are is the level of policy decentralisation and, consequently, the collaboration between different levels of government. The more independent sub-national levels of government are, the more significant the chances for incoherence between national and regional/municipal cultural policies. At the same time, weak bureaucratic competencies at the regional and municipal levels represent another critical factor that might account for the limited operationalisation of stated policy goals.

### 2.3. How to Increase Coherence?

Based on the points above, what would be possible ways of enhancing the coherence of cultural policies – to align the actual implementation of these policies better with the values that legitimate them? In Table 4, we summarise a set of recommendations based on the abovementioned incoherences. The recommendations are expanded upon below.

**Table 4. Recommendations on How to Reduce Identified Incoherences**

<i>Incoherence</i>	<i>Explanation</i>	<i>Recommendations</i>
Political priority and actual politics	Incoherence between what is an explicit priority and what is actually prioritised	Implement transparent and explicit policies
Economic/funding	Incoherence due to lack of funding to back up political values	Increase and prioritise funding of culture
Conflicting value conceptions	Different interpretations of the same value	Increase bureaucratic (top and street-level) competence, create shared conceptions of value, and increase dialogue between

		stakeholders at different levels
Political values vs. governing structure	Incoherence between stated policy and an administrative apparatus in place to effectuate policies	Develop and professionalise competent cultural administrations
Emerging value (yet) not implemented	Value acknowledged as essential, but yet with no impact on implementation	Pursue long-term and dynamic policies - combining long-term goals and the ability to respond to innovations and challenges

- ⇒ **Recommendation 16:** Implement transparent and explicit policies. Both for the general legitimacy and for the coherence of cultural policies, these policies must be transparent and explicit. This means that it should be evident both for the general public and for the different stakeholders within the cultural sector what the priorities are, how decisions are being made, who has what responsibility, and what gets funded on what grounds. We see from our case studies that this is far from the case in several countries.
- ⇒ **Recommendation 17:** Increase and prioritise funding of culture. While it is not an easy fix, and of course, easier said than done, there is no doubt that the available funding for culture is a crucial factor in making policy values and implementation more coherent. The most transparent, updated, competent, and dynamic policies are of no use without funding to back them up. Furthermore, increased predictability of funding will, necessarily, also ensure more stable and less ad-hoc policies, adding to the policy coherence.
- ⇒ **Recommendation 18:** Increase bureaucratic (top and street-level) competence, create shared conceptions of value, and increase dialogue between stakeholders at different levels. This recommendation deals primarily with the role and the expertise of bureaucrats. Even if their role is different in different countries, due to political systems and traditions, a common need is for these bureaucrats to have sectorial competence and knowledge and to engage in regular dialogue with stakeholders at different levels. One element worth mentioning is the systematic use of evaluation systems. Bureaucrats play a crucial role in gathering, interpreting and using results from different forms of evaluation in order to develop cultural policies into more effective and coherent policies. This can also contribute to creating shared conceptions of value.
- ⇒ **Recommendation 19:** Develop and professionalise competent cultural administrations. Related to the former recommendation, this point regards the more formal side of cultural administrations and bureaucracy. A well-functioning cultural administration needs to have designated positions with designated roles in the implementation of

policies. In other words, these administrations need to be of a specific size, they need to have a formal anchoring in the local/regional/national political system, and they need to be permanent rather than ad-hoc or project-based.

- ⇒ **Recommendation 20:** Pursue long-term and dynamic policies - combining long-term goals and the ability to respond to innovations and challenges. The final recommendation is related to the challenge of combining long-term and short-term policies. There are numerous advantages to predictable, long-term policies, where the accessibility of funding, the essential priorities and the fundamental values do not change every year. Such long-term stability can, however, lead to unwanted inertia and need, therefore, to be combined with possibilities to react more swiftly to innovations and challenges. The topics of sustainability, digitalisation and artificial intelligence are three cases in point.

### **Boxed text 1. Focus on Culture-Led Urban Regeneration**

In recent decades, culture has increasingly been mobilized for shaping and promoting places. Many culture-led urban regeneration initiatives have been mainly oriented to economic objectives, and their effects have been evaluated in economic terms only. Both initiatives of this kind and their narrowly conceived evaluation have been harshly criticized for their inefficiency. Nevertheless, culture-led urban regeneration programs are very diverse in nature, size and objectives. Often, they look to produce multiple values beyond economic value and are evaluated, formally or informally, in a more comprehensive way. In UNCHARTED, we have applied the analytical perspectives elaborated along the project on the values and evaluation of cultural practices to the policy field of urban cultural regeneration, with the aim of revealing an alternative perspective of evaluation of these processes, on the one hand, and the potential of a pragmatist vision of valuation for identifying fundamental challenges and valuable guidelines for urban cultural regeneration planning and management, on the other.

In UNCHARTED, we have considered large-scale cultural policy initiatives, like cultural megaevents, which often have urban regeneration objectives of an instrumental kind, social or economic, under the prism of cultural strategic planning. However, we have delved into the policy field of culture-led urban regeneration by considering another kind of policy initiative: those related to cultural institutions or programs directly linked to cultural demands and objectives that aim to impinge on the urban setting additionally.

In this respect, we have mainly examined the case of the Fàbriques de Creació program in Barcelona. This program has involved the rehabilitation of 11 old industrial and historical heritage buildings owned by the municipality and located in 6 different neighbourhoods for setting spaces for innovation and artistic experimentation. These are spaces run by various associations and foundations, in addition to the city council, under a shared governance umbrella. We have considered this case in the context of the previous trajectory of culture-led regeneration initiatives carried out in Barcelona over the last forty years, a very prominent trajectory that has made the city an exemplary reference for this type of process. Moreover, we have considered this case in contrast with two other control cases, one in Budapest (urban

cultural regeneration initiatives carried out in the 8th district in recent years) and another in Porto (two opposed cultural institutions: a flagship cultural facility, Casa da Música, and a grassroots cultural organization housed in a condominium, STOP). Finally, we have developed a co-creative experiment on the evaluation methodology implemented by the Barcelona city council in the Fàbriques de Creació program.

On the basis of all these analytical and co-creative elaborations, the following main challenges for improving urban cultural regeneration initiatives were identified:

Regarding the cultural contents of these initiatives, the main issue is to ensure their appropriate combination, which involves the existence of a plurality of contents, different values and functions, links to relevant issues and opportunities on the territory, and that they are productively articulated to the pre-existing heritage.

Regarding the place to locate these initiatives, the fundamental challenge lies in their adequate distribution in the territory, avoiding concentration, designing polycentric and well-balanced schemes, and ensuring that the selected places allow for establishing the right connections between contents.

Finally, regarding the people involved in these initiatives, there are two crucial challenges: a challenge of participation, of ensuring diversity, inclusivity and engagement, and a challenge of good governance, of enabling dialogue, co-creative action, plural and reflective evaluation, and permanent adaptability.

In relation to these challenges and considerations, a central recommendation emerges: urban cultural regeneration initiatives should be strategically designed to promote the plurality of values of culture from a site-specific perspective<sup>2</sup>.

### 3. Promoting the Plurality of Values in Cultural Institutions

This part addresses the topic of how cultural institutions' configurations and strategies of action promote plurality of values in cultural institutions, with a particular focus on equity, diversity and inclusion (EDI).

Two main institutional configurations are considered: multilateral partnerships, which might include, for instance, public-private partnerships or the long-term concession of public spaces, and cultural action in hostile, i.e. deprived and authoritarian contexts.

Drawing from a set of findings from WP4 case studies, we report the main issues that emerged, and we develop policy recommendations for each configuration considered.

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<sup>2</sup> In our Third policy brief we specify this recommendation in more detail.



### *3.1. Main Issues in Multilateral Partnerships*

In multilateral partnerships, diverse actors such as for-profit and not-for-profit organisations or public agencies at different levels (local, national, or supranational) collaborate, at least in theory, towards a common goal. This institutional configuration is typical in the pursuit of EDI values. Like other societal challenges, the complex task of promoting EDI values involves the coexistence of partners with different natures and goals. For instance, private-public partnerships bring together actors who must secure a return on investment with actors that are not profitability-driven.

Another crucial aspect characterising multilateral partnerships is that they are regulated by contractual agreements, which may be more or less explicit about EDI values. In the cases analysed, although EDI constitutes a crucial aspect of the partnerships' missions, no reference to these values is included in the contracts, which focus mainly on the responsibilities of each partner and financial aspects.

We observed that the lack of specification relating to EDI values leads to explicit conflict between the parties involved in relation to the interpretation of EDI and beyond.

The case study of the Austrian participation at the Venice Architecture Biennale 2023 is eloquent in this respect. AKT & Czech, the curators of the Austrian Pavilion, presented a project aimed at providing free access to the pavilion to Venetian citizens. After a complex negotiation, the Biennale did not grant permission to proceed with this project. While for the Austrian Pavilion, providing free access would have resulted in favouring inclusion, for the Biennale, this would have been unfair to paying visitors, the other pavilions, and the institution itself. This clearly shows an opposite conception of inclusion and the consequent tensions and conflict between the parties.

Our qualitative case studies showed that the coexistence of diverse actors results in different interpretations of EDI values and the development of various strategies and actions. Despite the commitment to collaborate, in fact, it is pretty standard that partners experience tensions or open conflict when working together. This is often the result of the existence of power differences between actors and weaknesses in the agreements that should regulate the relationships between parties. When conflicts go unresolved, parties may adopt individual strategies that block or reverse the progress toward a collective goal.

### *3.2. Recommendations for Multilateral Partnerships*

The following recommendations aim to increase the alignment of actors involved in multilateral partnerships centred upon EDI values.

- ⇒ **Recommendation 21:** Beyond rhetoric. The attention to diversity, equity and inclusion has been growing in both the public and private sectors. Firms and public institutions are increasingly committed to EDI values, showcasing programs and actions on their websites, social media, and public documents. This also happens in the cultural field, where reference to EDI values is increasingly included in the description of the offer of cultural institutions. However, it is often unclear if the interest in these values is genuine or if it is part of a broader rhetoric that reduces EDI values to a fad or a fashion, making them something that ‘you cannot avoid doing’. To move beyond rhetoric, we suggest that actors involved in multilateral partnerships discuss how these values would translate into practical actions. For instance, developing the value of inclusion may require spelling out who the audiences are and the ways they would be involved; clarifying the meaning of diversity may include discussing which kind of diversity will be targeted. Lastly, the operationalisation of equality may start a reflection on admission criteria, referring, for example, to the pricing policy. In other words, if EDI values are at the core of a partnership, then a discussion about the meanings of these values should take place starting from the design stage. Thus, we argue that it is essential to go beyond statements. After having attributed a shared meaning to the plurality of values, it is necessary to identify the related actions in a concrete way, detailing their phases and objectives, together with the ways to assess them. In this respect, it would also be relevant to appoint an internal figure to the organisation responsible for these activities.
- ⇒ **Recommendation 22:** Contracts first and align. Moving on from the design stage, reference to EDI values should be included in the formal contractual agreements that regulate multilateral partnerships. In these contexts, there is often a lack of univocal interpretation of these values, which might be a result of different missions. In this respect, a shared view is the fundamental premise in order to allow the parties to co-develop the meaning to attribute to values, which should be undersigned at a contract level in order to reduce tensions. Contracts play, in fact, a fundamental role in partnership management: it is essential to develop ‘formal relational contracts’ and to update them periodically in consideration of the changing dynamics of the parties as well as their collaboration. It is important to pay attention to the fact that these contracts need to be ‘formal’, meaning that they should be in written form and legally enforceable. In addition to that, they are called ‘relational’ because they include many components of a traditional contract but also contain relationship-building elements such as a shared vision, guiding principles, and robust governance structures to keep the parties’ expectations and interests aligned. This legally enforceable contract is beneficial for highly complex relationships. In addition to public-private partnerships, it can be applied in the case of strategic alliances, joint ventures, franchises, major construction projects and collective bargaining agreements. We argue that it would be particularly successful also in the case of the cultural and creative sector, with a particular reference to the coordination and promotion of the plurality of value and beyond.
- ⇒ **Recommendation 23:** ‘Truth lies in the middle’. The co-presence of different entities with diverse (somehow opposed) missions requires the presence of figures specialised in the negotiation between parties (meta-mediators), whose involvement would allow for balancing conflicting interests and developing long-term healthy partnerships. Also, their role is critical in levelling power differences, often present in the context of multilateral partnerships and which can often make the collaboration unbalanced. Meta-mediators should be neutral figures external to both parties, with knowledge of

legal aspects, mediation skills and experience in partnership and conflict management. This figure should be appointed prior to the partnership establishment and involved from the design stage of the collaboration. The role of the meta-mediator is also essential in the development phase of the formal partnership contract: they need to listen to both parties, understand their mutual needs, and make them converge in a unique direction in the interest of the organisation they are managing together. Also, this figure is fundamental as a means of conflict handling, and consensus building represents one of the key strategies. Meta-mediators should develop tailored assessment models, be able to understand the history and background of the conflict, determine the relevant parties and their power relationships, glean the positions and diagnose whether or not a consensus-building process is feasible. In addition to these considerations, such assessments should also include how the conflicting parties are framing the dispute in order to deepen and sharpen understanding of cognitive and relational impediments to partnership and how they might be overcome. Thus, the meta-mediator has the essential role of moving parties from a contentious behaviour to a problem-solving orientation, which can make the collaboration more efficient and the parties more proactive in the long term.

### *3.3. Main Issues in Cultural Institutions in an Illiberal Context*

Second, this part introduces the question of the integration of EDI values in deprived urban neighbourhoods, moreover, in an authoritarian political regime. This means that the observed local cultural institutions are working in an often unsupportive or even hostile cultural-political context. When we are researching the values of the culture of these cases, we should interpret them within this complex social and urban regeneration policy.

More concretely, this also means that the programmes and activities that the cultural institutions are offering in these contexts are, in the first place, aiming to solve or mitigate educational segregation and the disadvantageous position of the local population at the labour market. This necessarily implies a broader understanding of culture in comparison with institutions operating in less problematical environments.

The specific cases we have investigated are two community centres in deprived districts of Budapest, Hungary. The centres offer educational activities, sports and dance classes, and summer camps for children and teenagers. At the same time, for the adults, there are specific art programmes as well as support groups for (single) mothers.

Regarding the question of implementing EDI values in a hostile context, it seems clear that the examined values strategies remain only valid at a local level, depending very much on personal engagements, as the larger, national political level stays either passive or even confrontational toward the integration of such values.

In both cases, we may state that the principal values strategies are targeting social inclusion and cohesion and identity/community building. Here, the primary strategy is targeting disadvantaged children and youth through educational, cultural, and sports programs.

These objectives are pursued utilising cultural (in the comprehensive sense of the term), educational, and recreational methods (from after-school learning activities to hip-hop dance and box classes, together with summer camps and participatory collaboration to art projects), all challenging to tackle early school dropout which is one of the main obstacles to social mobility.

When analysing the value strategies, it is very palpable that they are reflective of the local, socio-territorial context: an EDI values strategy means engaging local society, expressly hitherto excluded, marginalised communities. Furthermore, these strategies are primarily in- or semi-formal, so eventually, it will be hard to trace back their actual effectiveness. So, in reality, these strategies mean the maintenance of personal relationships and complex, reflective, multifaceted presence in the local community. The reach-out toward the marginalised communities is also carried out by the fact that the buildings of the institutions are open during the daytime, so visitors (primarily teenagers) can use the facilities freely. While they may join different activities, it is not obligatory to participate in them. This shallow threshold approach is a very efficient tool in community building, creating a sort of 'third places' that lie between homes, often in deplorable conditions, and the street.

Value implementation strategies are carried out through partnerships, collaboration and community participation. These activities often rely on the personal network of the representatives, as well as a very active and responsive social media presence. The weight of individual credibility and personal relationships ensures the implementation of implicitly expressed value strategies. In practice, this means an extensive range of actors with whom the institutions are in daily contact: from local and national politicians through scholars and artists to the (often low-class) Roma and non-Roma local inhabitants; there is a powerful and extensive network of people. To sum up, we may observe strong local communities that engage in participating in various activities for extended periods.

### *3.4. Recommendations for Cultural Institutions in Illiberal Contexts*

- ⇒ **Recommendation 24:** Developing value strategies must be learned. The research carried out in both cases showed that, in general, the formal evaluation schemes and documents themselves (business plans, public service contracts, annual reports) struggle with the interpretative problems inherent in the use of a formalised structure, categories and KPIs. Moreover, the formalisation of the documents does not seem to have been accompanied by the acquisition of project management skills and approaches. Therefore, there is little evidence of actual evaluation processes in these formal evaluation systems. To compensate for these lacks and guarantee a more consistent and meaningful evaluation, we are suggesting the organisation of training to equip staff with adequate skills to manage and develop value strategies and evaluation systems.

⇒ **Recommendation 25:** Value strategies work if they are reflective. As explained in previous documents, both centres are located in urban neighbourhoods that are facing specific social and urbanistic challenges related to the high proportion of the disadvantaged population, the rapid change due to rehabilitation projects, and

gentrification. Therefore, place-based challenges and local specificities should be much more reflected in value strategies.

⇒ **Recommendation 26:** Test and integrate participatory elements in elaborating value strategies. As both institutions have a substantial and cohesive community, it would also be feasible to establish an ‘advisory board’ of local people who could regularly oversee the institution and its activities, promoting EDI values and contributing to making the cultural offer more reflective. Emphasis should be placed on experimentation and testing, as participation techniques that work effectively elsewhere may not be applicable in a different context or may not be able to address place-based challenges efficiently.

## 4. Understanding Evaluation of Equality, Diversity, and Inclusion Initiatives in Cultural Institutions

This section of the roadmap draws on case studies undertaken as part of Work Package 4, which specifically focused on the values of equality, diversity, and inclusion (EDI) in cultural institutions (these values are discussed in the previous section), along with the evaluation of EDI-related activities of these cultural institutions. Specifically, we asked how institutions evaluate the impact of their actions and look for the tensions that emerged from evaluation systems.

UNCHARTED research shows that cultural policy, especially when backed with funding, affects the actions of cultural institutions. Good policy supports and develops existing orientations toward EDI values by enabling best practices amongst arts organisations already committed to EDI activities and encouraging those organisations who have been slower to address EDI values to pay more attention to EDI issues. Well-considered funding supports EDI activities, such as programmes or exhibitions aimed toward non-traditional or under-served communities. Finally, policy can promote specific partnerships, for instance, with private entities or universities, to produce and/or evaluate activities.

The evaluation of EDI initiatives is crucial for governments, funders, and cultural institutions themselves to understand the importance and impact of their activities. Cultural policy should promote effective evaluation, but there are many challenges involved in doing so. For instance, highly standardised, metrics-based evaluation can be helpful for comparability but is likely to miss critical nuance. Relatedly, evaluation focusing on quantitative, short-term logic (often held by governmental, non-governmental or private funders or partners to cultural institutions) may conflict with evaluation focusing on qualitative, longer-term logic (often held by cultural institution personnel), creating tensions among actors who focus on one or the other style of evaluation. The policy advice provided here seeks to address such challenges.

### 4.1. Main Issues

The research undertaken by the UNCHARTED teams found a wide range of evaluative practices used to understand the EDI activities of cultural organisations. We identified four major axes of

classification which characterise different evaluation systems. The first is ex-ante versus ex-post evaluation. In other words, a focus on evaluation that occurs before (ex-ante) or after (ex-post) the evaluated action takes place. Most explicit evaluation occurs ex-post, during and after a particular activity or period. However, we also found instances where cultural organisations choose projects specifically to appeal to potential funders. For instance, cultural organisations in Hungary targeted their activities to meet the goals of the funding municipality. Cultural institutions also engage in explicit ex-ante evaluation when choosing projects to support and/or fund, such as in the case of artistic interventions selected by the jury. Challenges with ex-ante evaluation involve the potential for the actual activity to differ significantly from that which was planned. It also risks uneven or absent evaluation of the activity itself and the loss, therefore, of the potential to learn from it.

We found that ex-post evaluation to be usefully divided along three further axes, which are not mutually exclusive. Such evaluation can be placed on the axis of formal versus informal. Well-defined and explicitly expressed, formalised forms of evaluation produce results which are collected into reports of one sort or another, often for funders, and tend to be outward-looking (to funders or the public). In contrast, informal evaluation is usually done by cultural institutions in an inward-looking way (toward the cultural institution itself). Methods of informal evaluation range from semi-structured mechanisms, such as exit surveys, to ad hoc ones, such as casual chats with artists or audience members.

A further axis, quantitative versus qualitative, does not map clearly onto the formal versus informal. Although most formal evaluation uses quantitative measurements, qualitative evaluation could, in principle, be included. Indeed, qualitative evaluations are often highly formalised. From the opposite axis, informal evaluation often rests on qualitative or even intuitive approaches but does not preclude quantification.

A final axis considers who is involved in creating the evaluation and for whom. In binary terms, this is internal versus external evaluation, which considers whether the evaluation is undertaken by actors who are inside or outside of the cultural institution. However, internal versus external is too simple, so we have defined four general types of evaluation on this axis of classification.

- A. External evaluation involves the situation where an external body evaluates the cultural organisation. For example, Portuguese cultural institutions drew on external evaluation teams, often related to funders or academic researchers who could bring specialist evaluation methods to bear on the activities. A challenge with this type of evaluation is that organisation members understand the goals and the values of the organisation better than external parties, but they are not included in the evaluation team. Consequently, the evaluation may not be in line with the needs or desires of the cultural organisation.
- B. Externally oriented, internally produced evaluation involves formalised, outward-facing evaluation that is produced by cultural institutions as required by funders. This is found, for instance, in the United Kingdom, where National Portfolio Organisations (those funded by Arts Council England) are required to report on self-generated targets and fill in templates that rest on quantitative metrics ('tick boxes'). While organisations in our studies understood the need for evaluation relative to funding, organisations across several countries perceived the quantitative evaluation grids required by funders as

reductive and inadequate since they do not capture the complexity of organisations' work on EDI values.

- C. Internal evaluation is done within cultural organisations and is inward-facing. Such evaluation may be collaborative with employees and possibly artists, but such evaluation tends to involve audiences and/or local communities as research subjects rather than collaborators in the production of knowledge. This type of evaluation can be beneficial for cultural organisations, and it often accords with values of informality, horizontality, and resistance to bureaucratisation. However, its often ad-hoc nature can limit systematic comparison and may harm the visibility and legitimacy of the cultural activities produced since such evaluation is not disseminated beyond the organisations' borders.
- D. Co-created evaluation involves external parties such as audience or community members or 'critical partners' (such as academic or evaluation experts). This style of evaluation is conversational, flexible, and fully embedded in an organisation's activities and ambitions. An example of this is from a UK case study where a cultural organisation created an advisory board comprised of organisational staff and community members, all of whom were compensated (either by salary or reimbursements). This type of evaluation works well to match the needs of internal and external parties; however, it takes time to work through potentially differing discourses and approaches to reach a consensus.

These different types of evaluation are also not mutually exclusive, and most cultural organisations studied in the work package used more than one method concurrently.

#### 4.2. Recommendations

Based on our case studies, we have formulated six specific policy recommendations designed to improve evaluation, especially around EDI issues. Our research did not focus on other potentially essential outcomes or activities, such as sustainability or symmetry across the territories of a nation-state. However, our recommendations should be transferrable across areas of excellence (promotion of EDI, sustainability, symmetry or other valued outcomes).

⇒ **Recommendation 27:** Promote (and Fund) Good Evaluation. Good evaluation is crucial to the cultural ecosystem, allowing cultural organisations to continually enact their aims and visions, improve their operations, and achieve artistically and socially valued outcomes. However, good systems of evaluation are expensive in terms of staff time and other resources. Policymakers in municipalities, regions, nation-states, and the European Union should design evaluation into policy and funding. In this way, it would be helpful to develop ongoing evaluation frames and techniques that cultural institutions can operationalise. Quantitative metrics are handy for comparability across different types and sizes of cultural organisations and may be required by the nation-state to show 'value for money'; however, cultural organisations perceive these as reductive. Consequently, investing both in better metrics and alternative evaluation

measures that can stand alongside formal, quantitative metrics may better serve the needs of communities and the cultural organisations that serve them.

- ⇒ **Recommendation 28:** ‘What Gets Measured Gets Managed’. Related to the first recommendation is that policymakers pay attention to socially desirable outcomes, such as EDI. As shown in several of our case studies, policy attention to an area, especially when it is attached to funding, achieves a beneficial focus on that area, leading to improvement and expansion. However, a caveat is the potential for gaming and nominal incorporation of the stated values. Good evaluation can help counter this risk.
- ⇒ **Recommendation 29:** Against a ‘One-Size-Fits-All’ Approach. In many national contexts, removing metric-based evaluation entirely would not be feasible, and many private funders also prefer or require such metrics. Nevertheless, policies that allow for the incorporation of non-metric categories of evaluation would usefully record the work and impact of different size organisations with varying orientations for a range of time horizons. For instance, reducing complex individuals with intersectional identities to tick-boxes based on skin tone or postal code (for social class) cannot capture the richness of more diverse audiences or inclusive programmes. Similarly, measuring ‘success’ based on audience numbers exposes contradictions of a metrics-based approach since small, local organisations cannot attract a large, international audience in the same way a world-famous institution can. However, the former may make the same or more outstanding contribution to EDI outcomes in a community. Further, some socially desirable outcomes, such as greater equality, diversity, and inclusion, may develop over a long-time horizon. For instance, by supporting the career of an emerging artist from the Global South or making a child from a disadvantaged community feel welcome in the organisation’s space, the organisation increases the diversity of successful artists and widens the audience pool in the future. These kinds of impacts pay off over time, not in a single fiscal year. External evaluation should be able to assess how organisations talk to people in their communities and should be tailored and specific for organisations, including size and themes. Steps taken toward long-term goals should be evaluated alongside short-term outcomes.
- ⇒ **Recommendation 30:** Training, Networks, and Best Practice. Promote training in evaluation techniques within teams to improve informal internal evaluation as well as to contribute to more effective outward-facing evaluation amongst the staff of cultural organisations. A system of publicly funded training in evaluation techniques should be offered to cultural organisations. Such training should provide a varied toolkit of qualitative and quantitative techniques, along with report writing and case-study reports. Case studies can collect examples of best practices in the policy area, such as how an organisation is achieving EDI objectives through various means such as programming, activities, staffing and the like. Organisations should be encouraged to generate networks to share such examples of good practices evaluation. A publicly funded system of co-creative talks could be designed and curated in collaboration with the awarded institutions. Cultural ministries or public funding bodies could keep centralised digital databases with examples of good practices to be shared at many levels. Best practice awards could publicly recognise excellence in cultural organisations.
- ⇒ **Recommendation 31:** Support for Co-Created Evaluation Involving (Potential) Audiences. Support organisations’ efforts toward the creation of their internal systems of evaluation, including co-created evaluation involving (potential) audiences, including



‘non-traditional’ audiences and under-served publics. Such evaluation can build or strengthen connections to communities and generate new ideas. Many cultural organisations actively incorporate alternative systems of evaluation, going beyond the neoliberal assessment marked by metrics and numbers. They highlight the need for more ‘reflective practice’ as an internal target. Such co-created measures would work alongside externally driven evaluation as required by some nation-states. Currently, some organisations have developed innovative activities to involve individuals from the locality, but these exist only in ‘patchwork’ form. More co-creative endeavours across the sector and more integration into the organisations could reap benefits as organisations ‘live and breathe’ EDI by including a more comprehensive range of voices in evaluation. This co-creative evaluation would also be helpful for cultural organisations in Europe which are not currently subject to forms of state-level evaluation. In many of these cases, evaluation exists mainly at the informal level, which is perceived as a benefit relative to organisational values of such resistance to hierarchy or neoliberal agendas. However, greater involvement of those who benefit from cultural activities and a more informed approach to such internal evaluation would allow a higher quality evaluation without compromising organisational values.

⇒ **Recommendation 32:** Encourage Evaluation Partnerships with External Allies. While the previous recommendation focused on the knowledge embedded in communities about communities, this recommendation focuses on tapping expertise held by specialists, such as those with expertise in evaluation. Policy should encourage and ideally fund evaluation partnerships with external allies to develop more ‘conversational’ and ‘reflective’ systems of evaluation. This will generate richer data and new ideas. An ideal system of evaluation should be embedded in the internal capacities of the organisation, working closely with all their staff instead of coming as an external force. In this way, expertise can be brought into the organisation, where it can be harnessed to good effect. External evaluation without the input of cultural organisations risks being irrelevant or ignored by the cultural organisations. However, an external party can bring an informed, disinterested, and thoughtful perspective. In some of our case studies, local universities were perceived as potential partners for improving the evaluation system and offering critical but supportive feedback. However, these cultural organisations could not afford to pay for university staff time.

In summary, we suggest that policymakers consider how to improve evaluation by supporting best practices through training, networks, and awards and to develop evaluation frameworks co-constructed by cultural institutions, the participants, such as audiences, attendees, or members of the public involved, or potentially involved in the evaluated activity, and external experts. Such co-created frameworks would, in effect, internalise external knowledge and expertise. The co-created frameworks could stand alongside more metric-based external or externally focused evaluation where nation-states require that.

## 5. Promoting the Plurality of Values in Cultural Information Systems

This text delves into the intricacies of experimental co-creation processes within the framework of the Portuguese cultural information system, offering a comparative analysis with control cases in France and Emilia Romagna. The exploration focuses on two primary initiatives within the core case: the renewal of a national survey on adult education and training and workshops involving cultural organisations. While the former expanded its purview to encompass a broad spectrum of cultural practices, media, and spaces, the latter engaged stakeholders in shaping guidelines for system renewal. The control cases, though revealing collaborative practices, lacked the depth of the experimental co-creation process.

### 5.1. Observations

The French cultural information system mobilises a set of values consistent with the three fundamental values underpinning the policies of the Ministry of Culture: freedom of creation, social and territorial access to culture, and social ties through culture. These are the values on which the surveys on creators, cultural practices, the role of culture in emancipation, leisure, education, and the feeling of belonging to the community are based. A significant section is also devoted to the economics of culture. Nevertheless, it seems to us that this is less a value than a dimension that conditions the effectiveness of values that are otherwise at the heart of public issues. However, we can consider that values revolving around cultural democracy, cultural rights and the diversity of cultures experienced by residents remain in the minority compared to those revolving around democratisation (statistics on cultural offerings, their authors, and social access to cultural goods thus defined).

On the other hand, the process of accreditation of regional museums in the Emilia Romagna region reveals a significant concern with the systematisation and establishment of rankings of the museum network in order to guarantee the values of access and quality.

The Portuguese cultural information system follows the same set of values as the French model. However, it emerges as highly centralised, revealing a deficiency in articulation within the cultural and artistic field and a dearth of academic expertise, as well as a lack of resources, both in the budget for culture and for the administrative bodies that produce statistics in this area. At the same time, we must emphasise its poor openness to civil society. There are no institutionalised spaces for consultation and involvement of academia, cultural agents and cultural citizenship. Finally, we have observed a monopoly of quantitative approaches.

Thus, Portugal has a weak research and information infrastructure model, with little interpenetration between experts, academia, artists, and cultural intermediaries, which weakens the public sphere and the decision-making process itself. In contrast, the French case demonstrates a consolidated system with robust links to researchers, placing emphasis on broad temporal comparisons but exposing underdeveloped qualitative dimensions. In Emilia Romagna, a focus on quantitative indicators for museum quality restricts collaborative methods, although

joint working meetings were conducted.

For the main case, we have mobilised both secondary sources (documents and statistics) and primary information (a survey on cultural practices and two workshops). The study meticulously navigates through the intricacies of the Portuguese cultural information system. In the first stage, documentary analysis scrutinises studies in sociology and information sciences on the Portuguese cultural information system, along with surveys producing indicators of cultural activity.

The second stage, involving primary sources, initiates collaboration with the Survey on Adult Education and Training, bringing together Statistics Portugal, the Ministry of Culture (Cultural Strategy, Planning, and Assessment Bureau), and the University of Porto/Uncharted (Fieldwork: 2023). The objective is not only to enhance an existing statistical tool but also to formulate principles and recommendations for the redesign of the Portuguese cultural information system. The final stage was a co-creative involvement. Two workshops with over 20 cultural organisations, facilitated by a team of scholars from the University of Porto and cultural entities, mark an experimental process. Discussions lead to a provisional consensus, progressively crystallising into a list of public policy recommendations. The Uncharted team facilitates this process by posing questions, using a flexible script, highlighting substantive advances, and fostering recognition and involvement from all participants.

The discussion during the workshops was guided by us in order to facilitate the co-construction of a set of recommendations that would adapt the Portuguese cultural information system to the values and needs of the most relevant players in decentralised administrations, the management of cultural facilities and cultural producers themselves.

## 5.2. General Recommendations

The study then synthesises a set of common recommendations that transcend specific contexts, offering a framework to enhance cultural information systems. These recommendations advocate for a collaborative and adaptive approach, recognising the dynamic nature of cultural phenomena.

- ⇒ **Recommendation 33:** The first recommendation underscores the significance of recognising cultural plurality, emphasising the need for an inclusive perspective that broadens the scope of public spending on culture.
- ⇒ **Recommendation 34:** The second recommendation focuses on establishing cooperative observation programs operating at various scales to create a more interconnected cultural information landscape.
- ⇒ **Recommendation 35:** The third recommendation calls for the adaptation of data systems to evolving cultural valuations, ensuring their relevance and reflection of the diverse cultural landscape.

- ⇒ **Recommendation 36:** The fourth recommendation advocates for innovating assessments by linking culture to broader concepts such as well-being and mental health, capturing the intrinsic value of cultural practices.
- ⇒ **Recommendation 37:** The fifth recommendation encourages the integration of quantitative and qualitative approaches for a nuanced analysis of cultural phenomena.
- ⇒ **Recommendation 38:** Openness and involvement characterise the sixth recommendation, urging the active engagement of diverse actors to enhance social recognition and foster an inclusive cultural information ecosystem.
- ⇒ **Recommendation 39:** The seventh recommendation highlights the importance of holistic perspectives, considering values, interests, power relations, and communicability for a robust information system.

### 5.3. Specific Recommendations

The following recommendations are derived from the participatory process involving uncharted researchers, cultural managers, and artists from different genres through co-creation workshops. However, they can easily be transferred and adapted to different social formations since they are the lowest denominators in European cultural policy models.

- ⇒ **Recommendation 40:** The first suggests incorporating post-practice dynamics, enriching the system with elements like conversations and sociabilities occurring after cultural practices.
- ⇒ **Recommendation 41:** The second urges scrutiny of non-public engagement, aiming to uncover motivations for non-membership and contribute to a thorough understanding of audience dynamics.
- ⇒ **Recommendation 42:** The third recommendation emphasises considering the uniqueness of audiences by institution and artistic genre, ensuring a targeted and effective cultural information system.
- ⇒ **Recommendation 43:** Responding to the digital landscape, the fourth recommendation suggests adapting to the digital attention economy, incorporating information from influencers and assessing the impact of social media on cultural practices.
- ⇒ **Recommendation 44:** The fifth recommendation underlines the need to emphasise profane public spaces, capturing a more diverse range of cultural practices beyond traditional venues.
- ⇒ **Recommendation 45:** The sixth encourages the development of longitudinal analyses, providing a nuanced understanding of the long-term impacts of cultural engagement.
- ⇒ **Recommendation 46:** Establishing regional culture observatories is the seventh recommendation, promoting polycentric and multidisciplinary analyses to

understand the unique cultural dynamics within different regions. These observatories, with small professional teams, would develop both quantitative analyses and qualitative studies, favouring the deepening of themes rather than the standardisation of procedures and the speed of results.

⇒ **Recommendation 47:** The eighth proposes capturing oral testimonies, building a rich database for secondary analyses and capturing the complexity of cultural experiences.

⇒ **Recommendation 48:** The ninth recommendation suggests producing ethnographic indicators to capture tensions and interactions within cultural processes, providing a nuanced understanding of the dynamics in the cultural landscape. Specifically, we recommend the creation of batteries of indicators produced by ethnographic immersion and sensitive to tensions /interactions:

- Between the author and the work (in its historicity, genealogy, and materiality);
- Between the author and the devices (instruments, means of work);
- Between the author and other authors or cultural agents with related positions in a particular field;
- Between authors and mediators.
- Between authors and receivers (via successive mediations);
- Between receptors.

⇒ **Recommendation 49:** The final recommendation advises a patient and in-depth approach to analysing cultural impacts, recognising that these effects require time, context, and finesse for adequate capture.

In conclusion, this study advocates for a nuanced and adaptive approach to understanding and valuing cultural practices in diverse contexts, emphasising the significance of experimental co-creation processes and comprehensive recommendations for enhancing cultural information systems. The fundamental nuances of renewing cultural information systems must be based on the openness and involvement of actors with diverse logics and interests to achieve greater social recognition of the categories and indicators constructed, as well as the communication and dissemination of information. Systematicity and robustness of an information system will be all the more significant if it manages to incorporate the dynamics of the actors involved, as well as the values and logic of action they develop, empowering them. The categories and indicators of this information system must be plural and imbued with a logic of cultural citizenship.

## **Boxed text 2. Focus on Cultural Strategic Planning**

In the framework of the experimental demonstrations of UNCHARTED work package 5 (WP5), Axis 1 was devoted to investigating the theme of cultural strategic planning and its relationship with the cultural values and valuation practices investigated in the other project's work packages.

The scope of the work of Axis 1 was necessarily limited, focusing on a particular space of the more general and broader domain of cultural strategic planning. Namely, we focused on the role and the impact generated by special cultural programmes launched by the public administrations. These programmes range from those related to the competition for the nomination of the national and eventually European Capital of Culture to regional initiatives devoted to cultural cities and specific cultural programmes run at the local level. The work has aimed to evaluate how benefits for the local communities are generated and can be improved, including the impact on economic stakeholders, civic organisations, the educational and tourism sectors, as well as the quality of life of the individual citizens.

More specifically, the study was articulated around one main case and two control cases. The leading case was explored by fieldwork activities, including stakeholders' interviews, an online questionnaire, and a final public event. Via participatory and co-creation approaches, the experience of Volterra22 was analysed. Volterra22 has been an intense programme of cultural activities implemented in the small historic village (10,000 inhabitants) as the follow-up of the nomination of Volterra as the First Tuscan City of Culture by the Regional Council. The two control cases adopted a desk research methodology to analyse and compare the outcomes coming from the main case with two different situations: on the one hand, the candidatures of the five Portuguese cities that competed for the Portuguese Capital of Culture in 2025 and on the other hand the self-assessment of a wide range of European cities reported by UCLG, the association of Cities and Local Governments.

The logic of the link between the main and control cases was based on comparator examples. This logic made it possible to look at the implications for smaller cities and towns/regions when compared within national cultural policy contexts. Looking toward future research, it would be interesting to add to this logic a shift to the logic of cities that did not bid for such cultural competition and how the employment of other culture-based regeneration and associated policies can be beneficial.

During the work of Axis 1, several challenges emerged, and they are described in the frame of WP5 outcomes (deliverable D5.3), while the Third Policy Brief (deliverable D6.7) illustrates the recommendations derived from the main and control case studies to cope with those challenges.

Special cultural programmes realised as part of the strategic planning of big and small European cities represent a significant opportunity for the territory and for the citizenry to progress, develop and regenerate. However, in order to unlock this potential, the special programmes should produce a legacy that lasts well beyond the duration of the programmes themselves. The sustainability and the continuation of the activities on a longer-term basis are problematic from different points of view. One common core aspect of the problem

encountered very often in case studies concerns the liaison between the special programme and the duration of the elected administration. When the administration changes on the basis of democratic elections, the programme created by the previous administration risks being abandoned. The fieldwork and the desk research conducted in Axis 1 of WP5 have shown the effectiveness of establishing a broad constituency around the programme from its building phase for the whole execution period. Setting up governance systems open to the participation of cultural and citizen organisations is a critical factor. Such systems should be able to represent the broadest range of requirements and expectations that exist on the territory: in the cultural sector – including individual artists and designer-makers – among prime users and from the participants in cultural activities, together with the demands coming from the economic and productive sectors.

## Conclusion

Lessons that stem from the research results accumulated during the UNCHARTED project are multiple and full of meaningful insight to favour the promotion and full exploitation, in its intrinsic plurality, of the societal value of culture. The reader will find them in all their richness in the previous sections of this document. Nevertheless, we found it helpful to summarise them in the conclusion of this roadmap.

In Part 2, we identified five challenges for cultural action and decision-makers:

- To produce cultural policies more respectful of the plurality of values expressed in society
- To produce more democratic cultural policies
- To produce policies implemented in a more coherent way
- To produce policies based on improved evaluation methodologies
- To produce policies relying on the most relevant cultural information system

In regard to these challenges and the recommendations presented in Part 3, we would like to present five graphs illustrating pathways for future cultural policies at the European, national, and local levels.



## 1. Pathways Toward Plurality

**The challenge of PLURALITY:** Equity, Diversity, and Inclusion (EDI) values are increasingly included in the description of the offer of cultural institutions. However, the capacity to incorporate the dynamics of the multilateral partnerships of actors and their empowerment within a logic of cultural citizenship is not always achieved.

### PROBLEMS, GAPS, INADEQUACIES

The lack of univocal interpretation of EDI values and the coexistence of diverse actors result in different interpretations of values and in the development of diverse strategies and missions.

Power differences exist between actors, which can impact the weakness of the agreements that should regulate their relationships, with the consequence of blocking or reversing the progress toward collective goals.

### RECOMMENDATIONS

The complex task of promoting EDI values requires the involvement of multiple actors with disparate motivations and interests, to discuss how these values would translate into practical actions.

Discussion about the meanings of EDI values should start from the design stage, spelling out who the audiences are and the ways they would be involved, and how to balance conflicting interests and develop long-term sustainable partnerships.

Place-based challenges, local specificities and participation techniques should be much more reflected in value strategies.

### INSTRUMENTS AND ACTIONS

European	National	Local
Developing “value contracts” as part of multilateral cultural partnerships.	Creating cultural mediators.	Creating cultural advisory boards to support institutional action in the field.

## 2. Pathways Toward More Democratic Cultural Policies



### 3. Pathways Toward Coherent Implementation





#### 4. Pathways Toward Improved Evaluation Methodologies

### The challenge of EVALUATION:

**Quantitative, short-term evaluation logic is often held by governmental, non-governmental, or private funders. Cultural institutions often hold qualitative, longer-term logics. The style of evaluation can create tensions among the actors when they are focusing either on quantitative or qualitative logic. External parties can bring informed, disinterested, and thoughtful perspectives.**

#### PROBLEMS, GAPS, INADEQUACIES

Standardised metrics-based evaluation is helpful for comparability but is likely to miss critical nuance. From the opposite axis, informal evaluation often rests on qualitative or even intuitive approaches but often miss quantification.

Ex-post evaluation is most explicit but cannot influence a better execution of the activity. From the opposite axis, ex-ante evaluation looks at the potential, but the actual activity could differ from what was planned and, missing the evaluation of the activity itself, loses the potential to learn from it.

Evaluation required by funders may not be in line with the requirements of the cultural organisations or with the expectations of the audiences.

#### RECOMMENDATIONS

A system of publicly funded training in evaluation techniques should be offered to cultural organisations that should embed evaluation in their internal capacities.

Designing evaluation into policy and funding would be helpful to orientate investment in better metrics and alternative evaluation measures that can stand alongside.

Greater involvement of those who benefit from cultural activities would allow a higher quality evaluation.

#### INSTRUMENTS AND ACTIONS

European	National	Local
Stimulate new participative evaluation approaches.	Integrate non-metric measurement tools into evaluation frames.	Developing partnerships between cultural institutions and universities.

## 5. Pathways Toward Improved Cultural Information Systems

