



UNCHARTED

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INTRODUCTION

This deliverable presents the results of the fieldwork carried out as part of Work Package 4. The surveys presented below relate to the second strand of the Work Package, which aims to provide a comprehensive analytical view of cultural policy effectiveness and impact in fostering the plurality of values of culture with a specific focus on cultural diversity, equality, and inclusion.

Our analysis focuses on cultural institutions. We can define cultural institutions as organisations that promote, preserve, produce, and distribute artistic goods. We limit our analysis to public or publicly funded structures. By doing so, this work is intended to complement that carried out in the first section of this Work Package that focuses on administrations (D4.3).

Previous Work Packages have highlighted the plurality of values associated with culture, whether in the context of cultural policies (WP2) or practices (WP3). This deliverable focuses on the concrete implementation of this plurality of values within the framework of projects developed by cultural institutions. We pay specific attention to the values of equality, diversity, and inclusion (hereafter EDI), which permeate many private and public organisations operating throughout the world (Pizzaro et al., 2022; Unesco, 1995; Unesco, 2005) and in Europe, as shown by the cases analysed in Strand 1 of this Work Package 4.

These values respond to the dual concern of preserving the cultural diversity of societies affected by globalisation (Meyer-Bisch, 2012) and respecting the right of minorities to access and participate in cultural activities within increasingly multicultural societies. Equality can thus be defined as a situation in which everyone is treated fairly according to their needs and where no group of people is given special treatment. The notion of equality thus refers to the idea of equal opportunities. Diversity is understood as the practice or quality of including or involving people from a range of different social and ethnic backgrounds, different genders, or sexual orientations. Finally, inclusion is defined as the practice or policy of providing equal access to opportunities and resources for people who might otherwise be excluded or marginalised, such as those having physical or intellectual disabilities or belonging to minority groups. Inclusion, therefore, refers to the idea of equal capacity to participate (Polityczna, 2015; Bonet et al., 2018).

The European Union (EU) explicitly recognises these values in its Charter of Fundamental Rights (Articles 21 and 22), as well as gender equality (Article 23 of the Charter, Article 8 of the Treaty on the Functioning of the EU; see also European Commission, 2020). EU also recognises the specific role played by cultural institutions in implementing these values, in particular, diversity and intercultural dialogue (European Commission, 2014).

In light of these elements, the first objective of this report is to examine the way in which European cultural institutions integrate these EDI values into their actions and operating methods. A second objective of this report is to examine the way in which these cultural institutions perceive and evaluate the impact of their actions with regard to these values. The promotion of EDI values goes hand in hand with the promotion of public policy evaluation and evidence-based policy (Parkhurst, 2017). The political authorities are thus increasingly imposing compliance with EDI values as a critical criterion in the evaluation of cultural institutions (see, in particular, the results presented in D4.3). This imposition raises the twofold question of the operability of this evaluation beyond the objectives and quantified results traditionally required in activity reports and of the constraint that it represents for institutions for which EDI values are sometimes incidental objectives of the action. From this point of view, the reflections

presented in this deliverable complement and enrich the work undertaken in Work Package 3 (D3.7 and D3.8) and that carried out as part of the third axis of Work Package 5 ('Cultural information systems'; see also D3.9).

In the remainder of this introduction, we will specify the research questions and methodological choices defined for this study. We have chosen to proceed on the basis of eight case studies of European cultural institutions from four countries: Hungary, Italy, Portugal and the United Kingdom. This deliverable is then structured in two parts. The first presents the case studies and their main findings. The second is a comparative analysis based on the eight cases. This comparative analysis aims to highlight the central dynamics and constraints in terms of the adoption and evaluation of EDI values by cultural institutions and to provide insight into the factors that explain these dynamics.

1. Research questions and methodology

1.1. Research questions

This deliverable is organised around two research questions:

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

First, RQ1 implies that case studies seek to understand how institutions integrate the plurality of cultural values, especially diversity, equality, and inclusion, in their actions from both internal and external perspectives. Internally, it means analysing configurations, status, and types of governance. Externally, it means analysing actions and partnerships. Second, RQ1 invites case studies to examine the goals (regarding the values mentioned above) and targets (the recipients) of action. Finally, RQ1 aims to determine the degree of connections among configurations, actions, and objectives. As a result, the research should lead to an analysis of how different strategies might emerge from value-oriented objectives.

RQ2: How does evaluation affect the action of cultural institutions?

RQ2 also has different implications. First, it aims to understand how institutions perceive the impact of their action, the desired outcomes, and potential unintended consequences. Second, it is to determine if institutions have a formal or informal evaluation system and, where applicable, analyse how institutions implement evaluation systems to assess their impact. Third, it requires the identification of potential conflicts between the different evaluation systems that might be present within each institution. Fourth, this research question implies understanding how institutions perceive potential limits in the evaluation systems or the problematic impacts of these systems on the strategy or implementation of actions. These questions will be examined at three levels, as far as possible, depending on case specificities: 1) supply (e.g., professionals in the institution and the cultural sector), 2) demand (e.g., audiences and the cultural offer), and 3) cultural policy (e.g., how a cultural institution's actions affect policy objectives).

1.2. Methodology and research strategy

General approach

Assessing the impact of cultural institutions on societal values, that is, beyond the narrow economic aspects, resembles a conundrum. Most previous studies on impact assessment use quantitative methods from economy and auditing comparable to a 'toolkit approach' (Belfiore & Bennett, 2010). We take the challenge to investigate this topic by focusing on how cultural institutions perceive their impact through a qualitative approach. Nevertheless, if this general approach relies mainly on qualitative data, we also mobilise quantitative data, when relevant and available, in a mixed-method logic.

The analysis of institutions' configurations, actions, and goals, in line with RQ1, as well as the analysis of existing evaluation systems (RQ2), will be made through documentary sources and semi-structured interviews with relevant representatives within each institution.

Institutions' impacts will be assessed through more specific methods, including focus groups (see cases PELE and Sonoscopia), non-participant observations of meetings and events (see cases Gyöngyi Rácz Community Center, Glove Factory Community Center, Mudec, Gasworks, and Nottingham Contemporary), or the analysis of quantitative data such as online tracks, visitor's statistics, and financial statements.

Case selection

Since our approach is comparative (Lipjhart, 1971, 1975), the sample of cases selected displays a variety of complementary cultural institutions investigated to illustrate the multiplicity of European cultural regimes.

First, the institutions were selected in each partner's country (Hungary, Italy, Portugal, and the United Kingdom). In this way, the selected cases reflect a plurality of administrative contexts and cultural policy models (Chartrand & McCaughey, 1989). Second, the complementarity of the selected cases was established regarding five criteria: 1) type of institutions, 2) level of action, 3) cultural sector, 4) targets of action, and 5) target values. By doing so, selected cases will allow comparisons between public and (publicly funded) private institutions; NGO and for-profit organisations; art institutions and institutions using art as a toolkit; local, national, and international levels of action; institutions targeting specific populations and institutions speaking to the largest number; institutions targeting EDI values directly and institutions targeting EDI values incidentally.

Each partner has selected two cultural institutions in its own country. Some of the cases analysed in WP2 and WP3 (e.g., Mudec) will be updated and complemented with more in-depth analyses (see D3.7 and D3.8).

Table 1 below presents the selected cases by each partner according to the five criteria.

Ethical issues

We are fully aware that our analyses could reveal potential shortcomings in the actions of institutions and eventually make them public in official reports. It could imply fateful consequences for the institutions under study - primarily small organisations - and thus violate the 'do not harm' principle of informed consent.

To anticipate this risk, we decided not to conduct a strict and neutral evaluation of the actions and impacts of the selected institutions but to understand how they perceive the outcomes of their action.

Table 1. Cases selected in Strand 2

Case	Partner in charge (Country)	Type of institution	Cultural sector	Level of action	Target populations	Values targeted
Glove Factory Community Center	ELTE (Hungary)	Public institution	Museum and heritage sectors, Education	City Level	Roma and non-Roma local citizens, youth, marginalised communities	Inclusion; Equity
Újpest Roma Local History Collection and Community Center	ELTE (Hungary)	Public institution	Education and Heritage sector	City Level	Roma and non-Roma citizens, members of other Roma institutions and schools	Diversity, Equality, Inclusion
Austrian pavillon at the 2023 Biennale	UNIBO (Italy)	Public institution within a private event	Architecture and urban policies	International	International community of architects and urban planners; Citizens	Inclusion & Equity

Table 1. Cases selected in Strand 2 (continued)

Case	Partner in charge (Country)	Type of institution	Cultural sector	Level of action	Target populations	Values targeted
Mudec	UNIBO (Italy)	Public-private partnership	Museum and heritage sectors	Local	Local citizens, people with a migratory background.	Diversity, Inclusion, Equity
PELE	UP (Portugal)	Association	Performing arts	Local and European	Cultural facilitators; Local communities; Vulnerable populations	Inclusion; Access to culture
Sonoscopia	UP (Portugal)	Association	Music	Local and European	Cultural facilitators; Musicians; Researchers; Youth	Inclusion; Access to culture
Gasworks	Goldsmiths (UK)	Registered charity organisation (NPO)	Contemporary art	Local	Artists; Minorities; Local populations	Diversity, Equality, Inclusion
Nottingham Contemporary	Goldsmiths (UK)	Registered charity organisation (NPO)	Contemporary art	Local, national and international	Local, national and foreign populations; Youth; Vulnerable families	Diversity, Equality, Inclusion

PART 1. CASE STUDIES

1. Hungary

1.1. Case 1: Rácz Gyöngyi Community Centre (4th district of Budapest)

Presentation

The northern gateway to the capital, the 4th district of Budapest, Újpest, lies 18.18 km² on the left bank of the Danube. Its history dates back to the 1830s and thanks to its favourable conditions, proximity to Pest, Újpest was an ideal area for industries (e.g. leather, cotton, light bulb factories, electrical machinery). In 1950, by creating Greater Budapest, the first agglomeration ring to be annexed to the capital, the town was incorporated into the administration of Budapest and although this change retained the district's factory town character and developed industry, it also transformed the townscape: housing estates were built on the old cemeteries, narrow streets and ground floor houses. One of the main consequences of these reconstructions was that a large part of the population was replaced. The number of permanent residents in Újpest is 96,963 (LEOP, 2022, pp. 5-7).¹

As one of the largest districts of the capital, Újpest has a great diversity of social realities, including various forms of disadvantages and social pathologies, such as unemployment, homelessness, spatial and social segregation, therefore, the local municipality develops different strategies to tackle these inequalities. An example was the 'Gate of Újpest' (*Újpest kapuja*) area renewal and urban regeneration project (partially financed by the ERDF, completed between 2018-2022, with a 5-year maintenance period during which the local municipality is committed to monitor the results.), the physical revitalisation of the crisis area in the Városkapu area of Újpest, improving the living conditions of the low-status population living there, and social integration of these people, combined with integrated social rehabilitation (LEOP, 2022, p. 55). This means that, similarly to the Magdolna Quarter Program in the 8th district, this rehabilitation project also seeks to provide complex and participatory solutions. In addition to the infrastructural interventions (park, playground and green areas, pavement renovation, renovation of municipal apartments, etc.), the project also includes prevention and community-building programmes, in which the municipal, church and civil organisations participate, such as the Social Institution of the Municipality of Újpest, the Újpest Cultural Centre Nonprofit Ltd, the Újpest Roma Minority Self-government, the St. Joseph Church and Parish of Újpest, the Habitat for Humanity Hungary Foundation and the Újpest Crime Prevention Citizen Guard Association.²

Újpest was used to be a predominantly factory and workers' district, which underwent a major redevelopment from the late 1960s to the mid-1980s, with the construction of one of the largest housing estates of Hungary. Rácz Gyöngyi Community Centre (*Rácz Gyöngyi Közösségi Központ*, RGYCC) is located in this area, in the Újpest Housing Estate Quarter (*Újpesti Lakótelep*

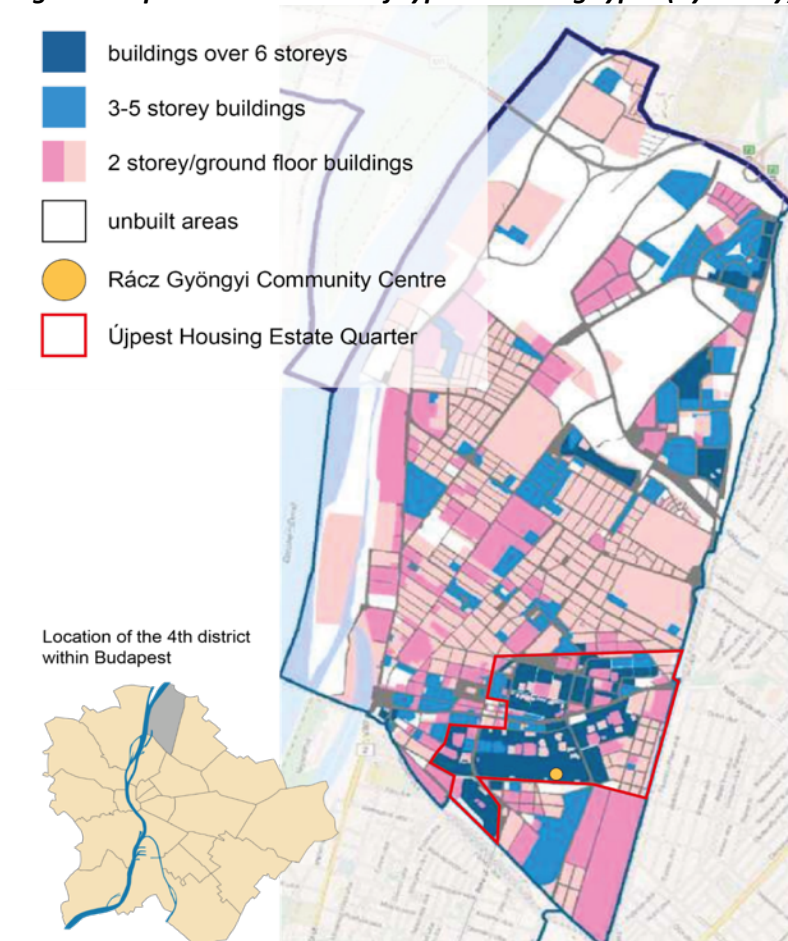
¹ Hungarian Central Statistical Office, 2022.

(https://www.ksh.hu/apps/hntr.telepules?p_lang=EN&p_id=05467).

² <https://kohesio.ec.europa.eu/en/projects/Q3958454>

városrész)³, in a pavilion building originally built to provide basic services for the residents (See Figure 1, Image 1).⁴ The community centre building was inaugurated in 2014 by the Mayor of Újpest and the Deputy State Secretary for Social Inclusion.

Figure 1. Spatial distribution of typical building types (by storey)



Source: UDC, 2015, p. 112.

The wider history of the RGYCC dates back to the early 1990s. The Minorities Act of 1993⁵ established minority self-governments (MSG) in Hungary, including that of the Roma. The law allows for any officially recognized ‘minorities’ (since 2012 ‘nationalities’) to establish MSGs at municipal, county or national level with educational, cultural and community purposes. After the 1994 end-of-year elections, the Roma MSG of Újpest (*Újpesti Cigány Kisebbségi/Nemzetiségi Önkormányzat*) was established in 1995.⁶ The main functions assigned to MSGs are cultural,

³ The subdivision of the district into quarters is primarily based on land use and building types, and therefore has a predominantly urban planning function.

⁴ Built in 1986, before the cultural and community function, the building was a local office of the Hungarian Socialist Workers’ Party (ruling party during the state socialist period), after the regime change it was a disco, a billiard hall, a local office of the Alliance of Free Democrats (liberal political party), a social and caritative service of a Hungarian church, a private school then it remained empty for nine years.

⁵ Act LXXVII of 1993 on the rights of national and ethnic minorities.

⁶ There are 11 minority/nationality self-governments in Újpest: Armenian, Bulgarian, German, Greek, Polish, Roma, Romanian, Rusyn, Serbian, Slovak and Ukrainian.

educational, and community-related. However, when the MSGs were created, it was unclear what their real purpose was. They were seen by many as a 'sandbox' for Roma politicians who had been marginalised from Hungarian political life, leaving their primary function according to the law, the cultural one, in the background or not even considered at all. Since its creation, the MSG has enabled the shaping of the approach to the municipality, characterised by a lack of involvement in Roma affairs, be they political, social or cultural, in other words 'it's their business'.

On the one hand, the creation of the RGYCC originated from the *Tanoda* programme, launched in 1995. The after-school education sessions for primary school children (6-14 years old) were one of the first initiatives coordinated by the Roma MSG and supported by the district municipality. According to István Gábor Molnár, the director of RGYCC, there have always been ad hoc municipal grants for this programme, which were accessed through personal contacts and lobbying during the first two decades of the programme. In 2015 it was included in the Integrated Urban Development Strategy (IUDS, 2015, p. 80), which meant that it has been recognised as a permanent function of the municipality ('ensuring educational inclusion' horizontal objective). Thus, it became an operational expenditure budget line, ending the previous era of informal 'chasing after money' so theoretically they have not been exposed to political change.⁷ Yet in 2019, a funding crisis emerged when the municipality cut funding, risking the end of Tanoda activities, and sparking protests from local primary schools. Since 2004, government funding has also been available through tenders. In 2014, they became permanently funded by the state-managed Tanoda programme, so from then on they did not have to participate in tenders.⁸

On the other hand, another important basis for the creation of the RGYCC was the local history research (oral history, libraries, archives) initiated by István Gábor Molnár from 1999. Before this research, there was a consensus that the history of the Roma before 1945 was not significant in Újpest. This was disproved by Molnár's research, which demonstrated that the Roma have played a significant role in the society and culture of Újpest since its foundation in the 19th century. The research revealed a large amount of historical source material (family archives, photos, etc.), which was first presented in 2010 in an exhibition opened by the then mayor. It was there that the idea of a permanent exhibition was first conceived.

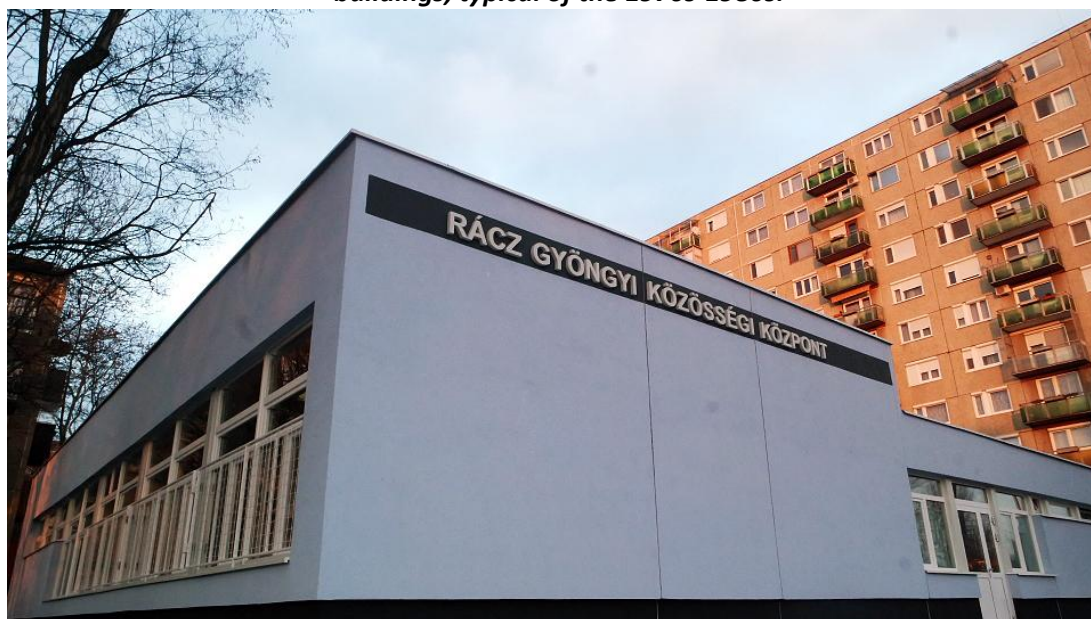
A larger space was needed for the development of the Tanoda programme and the gypsy local history collection, which was found in a vacant municipal building where the RGYCC operates today. The renovation work was carried out in several phases (between 2011 and 2019), from several sources (Ministry of Human Capacities, Újpest Municipality, tenders) and largely thanks to the joint voluntary work of local people. It was voted by the participants of the Gypsy Day event in 2014 that the community centre should be named after Gyöngyi Rácz (1944-2013).⁹

⁷ The 2019 municipal elections, as in most districts in Budapest, resulted in an opposition victory, replacing the Fidesz-led municipality of 2010-2019 with a coalition of six parties (liberals, socialists, ecologists, conservatives) and a local NGO.

⁸ The first *tanodas* in Hungary were founded by NGOs in the early 1990s, and after 1995 Roma MSGs also appeared as project owners. In 2004, the first public grants were provided to those already operating (Vercseg & Bernát, 2015, p. 15; Horlai, 2016, pp. 17-18).

⁹ Gyöngyi Rácz (1944-2013), the mother of the current director, was involved in the organisation of education for disadvantaged children at the Ministry of Public Culture, as 'subject leader on Roma' before 1990. She was one of the founders of the Eötvös József Gypsy-Hungarian Pedagogical Association, which she chaired until her death.

Image 1. Rácz Gyöngyi Community Centre surrounded by prefabricated residential buildings, typical of the 1970s-1980s.



Source: Roma Sajtóközpont (<http://romasajtokozyont.hu/passziv-haz-rengeteg-aktivizmussal-kozossegi-kozyont-ujpesten/>)

The RGYCC is technically not a registered institution or organisation, the building is the official seat of the Újpest Roma MSG. In addition to the MSG, institutionally the Eötvös József Gypsy-Hungarian Pedagogical Association (*Eötvös József Cigány-Magyar Pedagógiai Társaság*)¹⁰ provides the legal framework for programmes, events and projects (e.g. International Roma Library). As István Gábor Molnár summed it up, they are ‘pretty much like an NGO.’¹¹

There is no subordination between the municipality and the MSG, a partnership is required by law and therefore there is no permanent reporting obligation. For some programmes implemented with municipal grants, accounts and reports are required. The RGYCC is not listed as an educational or cultural institution on the municipality's website and no mention or direct link to it anywhere else. Apart from the occasional related news item, the only relevant information available is regarding the list and contact details of MSG members. The UDC and IUDS do not list either among the public cultural institutions in the district (UDC PS 2015, pp. 60-61).

The municipality budgets between 2020-2023 include grants (other operating expenditure) for the 11 MSGs in Újpest, including the Tanoda programme (See *Table 1*). There is only one Tanoda programme in the district, run by the Roma MSG.

¹⁰ Eötvös József Gypsy-Hungarian Pedagogical Association, founded in 1986, is a nationwide public benefit NGO on developing the pedagogy of Roma cultural heritage and expanding the possibilities for its institutional transmission.

¹¹ Interview with István Gábor Molnár on 6 July 2023.

**Table 1. Municipality grants for the 11 MSGs and for the Tanoda programme, 2020-2023
(put together by Gábor Oláh)**

Year	Grant for 11 MSGs		of which the Tanoda programme	
	HUF	~EUR	HUF	~EUR
2020	15 360 000	41 000	12 300 000	32 800
2021	18 030 000	48 000	15 000 000	40 000
2022	18 030 000	48 000	15 000 000	40 000

Source: Újpest Municipality

At the state level, there are two sources of funding for MSGs: one operational and the other task-based, distributed by the National Funding Agency for Culture (*Nemzeti Kulturális Támogatáskezelő*) (See Table 2). There are currently 1175 Roma MSGs operating at municipal level in Hungary,¹² which receive equal operating grants regardless of the tasks they undertake.¹³ For the task-based grants, the Ministry has developed a point-task system on the basis of which the grants are allocated. Each cultural activity corresponds to a specific point, which can then be monetised.¹⁴ In addition, since 2018, the Tanoda Programme has been funded from the central budget.

¹² Hungarian Central Statistical Office, 2022 (https://www.ksh.hu/stadat_files/fol/hu/fol0012.html).

¹³ The regulation distinguishes between two categories of municipalities: the first receives HUF 1 040 000 (~EUR 2800), the second HUF 520 000 (~EUR 1400) per year.

¹⁴ Újpest Roma MSG reported 11 points in 2020, 34 points between 2021-2023 (<https://emet.gov.hu/kategoria/kiemelt-kategoriak/programok/aktualis-programok/nemzetisegi-onkormanyzatok-feladatalapu-tamogatasa/>).

Table 2 Operational and task-based governmental grants for the Újpest Roma MSG, 2020-2023 (put together by Gábor Oláh)

Year	Operational grants		Task-based grants		Total	
	HUF	~EUR	HUF	~EUR	HUF	~EUR
2020	1 040 000	2 800	281 721	750	1 321 721	3 550
2021	1 040 000	2 800	789 888	2 100	1 829 888	4 900
2022	1 040 000	2 800	942 922	2 500	1 982 922	5 300
2023	1 040 000	2 800	858 500	2 300	1 898 500	5 100

Source: National Funding Agency for Culture

They also win ad hoc municipal and governmental grant money for specific projects (e.g. HUF 500,000/~EUR 1350 in 2022 from the Ministry of Interior for the expansion of the international Roma library and European networking, see *Image 2*).

Image 2 RGYCC colleagues visited the Médiathèque Matéo Maximoff in Paris in May 2022 as part of an international networking tour in Europe.



Source: Médiathèque Matéo Maximoff

RGYCC staff work in a voluntary capacity, i.e. they do not receive any remuneration. Teachers working in the Tanoda programme are paid by the hour.

Similarly to the GFCC, one of the main target audiences of the RGYCC – operating under the Újpest Roma Minority Self-Government – are the local children and youth, often with Roma background and with disadvantageous social background. Therefore, the self-government decided to organise an afternoon school for primary school children and young people who have dropped out of school. The programme has been a success, with the vast majority of children who finished primary school and have continued their studies in various professions.

Due to its success, the programme has been maintained, but in 2015 it was transformed into a **'Tanoda for disadvantaged Roma and non-Roma children'**. The Tanoda is primarily open to children and young people (grades 1-12) and aims to improve the quality of life and to provide pupils with schooling, education and various opportunities that may develop their abilities and skills. Many pupils have a one-to-one tutoring in a subject, while others attend a full week of individual and small group development. Besides the after-school learning activities, the RGYCC also organises monthly programmes ranging from museum visits to summer camps to organising their summer camps.

Image 3. Afternoon learning session (Tanoda programme) at the Rácz Gyöngyi Community Centre



Source: Roma Sajtóközpont (<http://romasajtokozpont.hu/passziv-haz-rengeteg-aktivizmussal-kozossegi-kozpont-ujpesten/>)

Another headline target group are Roma women, who are considered the most disadvantaged group in the European Union. To tackle the gender-related inequalities (such as long-term unemployment, single motherhood, loneliness and social isolation, gender-related discrimination), the RGYCC runs the **NŐsziRom Club**, aiming to support Roma women who are well known or less well known in their own Roma communities, but contribute to the development of their communities through their professionalism and career building. The club also points to the promotion of self-empowerment through the presentation of invited female guests. The sessions are conducted with discussions and artistic programme elements. The

NórsziRom Club emerged in a spontaneous way, after informal discussions between Éva Váradi, its organiser and other Roma women, when they were talking about the gaps in the visibility of Roma women, that is to say, how - no matter how their work and its fruit is significant in the field of culture, education, politics, social work, etc - they are much less well-known than the men with same type of professions. Therefore, the club chooses its participants in a very conscious way, emphasising the weights (and consequences) of intersectionality – by inviting elderly Roma women, who are often the forgotten representatives of the first / second generation of Roma intelligentsia.¹⁵

Image 4. Concert at the NórsziRom Club in September 2022, focusing on the life and oeuvre of Judit M. Horváth, photographer



Source: Facebook page of Újpest Roma MSG

The **Újpest Gypsy Local History Collection** local history collection is exhibiting the history of the Roma population of Újpest, who - since their arrival to the neighbourhood in the 19th century – were mainly nailsmiths and thanks to the proximity of the Danube and the great number of restaurants with garden areas, musicians (Molnár, 2013). The collection is based on a photo and document archive, completed with an oral history research, which was conducted in two parallel ways: local historians – who in general did not have much knowledge about Gypsies living in the neighbourhood – were asked to collect data about Roma people in the archives and in media, while interviews were made with the inhabitants, first of all with the elderly Roma Musicians of the district. The traditional and the oral history research was in a lot of cases contradictory and highlighted the discrepancy between an official canon (often trying to erase the presence of minorities) and the personal and communal memory of the Roma people of Újpest. Since its foundation in 1997, the Újpest collection stands as a community heritage project par excellence,

¹⁵ Interview with Éva Váradi on 6 July 2023.

in which local Roma inhabitants are not only involved through the discovery of their past but also in the informal education of the young generation. Besides the physical and virtual exhibition, the collection is an eminent tool through which Roma history is integrated in the collective local/national memory. In the previous years, they established monuments and organised ceremonies remembering the Roma victims of the Holocaust or the Roma heroes of the revolution of 1956.

Image 5. Erection of a 'Stolperstein' (stumbling stone) in 2015 in front of the RGYCC, in the memory of József Dráfi who was only 17 when killed in 1945 in the Ravensbrück camp.



Source: Facebook page of Újpest Roma MSG, available at <https://ujpestmedia.hu/emlekezo-macskako-drafi-jozsef-tiszteletre/>

The largely donation-based **International Roma Library** has been expanding since 2014 and now has a collection of over 6,000 books. In the long term, the plan is to create a well-organised, transparent library for researchers and the general public. They went on a networking trip to Western Europe in 2022, visiting local Roma libraries, exchanging books, building contacts in Paris, Strasbourg, Cologne and Heidelberg (See *Image 2*).

Methodology

As the MSG acts as a quasi-umbrella organisation for the community centre and other projects, the Act on the rights of nationalities (2011) is the primary source of the valuation strategies. As the law envisages a partnership between the municipality and the MSG, the former does not set out cultural policy values and missions for the RGYCC in its strategies. An exception to this is the

Local Equal Opportunities Programme, which is mandatory for all municipalities.¹⁶ It is in this section on people living in extreme poverty and Roma that we can observe valuation strategies by the municipality. The legal framework for the RGYCC is provided by the Eötvös József Gypsy-Hungarian Pedagogical Association in addition to the MSG, so its evaluation strategy is also important. The values associated with the Tanoda programme, which is the main pillar of the RGYCC, are also derived from the legislation.¹⁷

Since the RGYCC is in fact a physical – and not legal – framework for many community, cultural and educational activities, there are no evaluation schemes for this either at the municipality, the MSG, the ministries or by the Cultural Statistics Data Collection System (KultStat). As our interviewees pointed out, ad hoc grants require them to produce professional and financial reports. An exception to this is the Tanoda programme, for which they have to prepare an annual report (*ex-post*, internal, formal/informal) for the municipality. Of these, the professional reports for the 2014-2015, 2015-2016 and 2016-2017 school years are available (MSG AR 2015; 2016; 2017). These short reports are descriptive and do not include performance indicators.

As an evaluation of cultural practices, we can think of the point-task system, under which MSGs can receive task-based funding from the Directorate General for Social Empowerment, which is attached to the Ministry of Interior. However, precise information on the exact rules of the system was not available at the time of writing.

Two semi-structured interviews were conducted with:

- István Gábor Molnár, president of Újpest Roma MSG, president of Eötvös József Gypsy-Hungarian Pedagogical Association, director of RGYCC (elected official, street level bureaucrat) on 6 July 2023.
- Éva Váradi, initiator of NőszíRom Klub (street level bureaucrat) on 6 July 2023.

Findings

Connection with values of diversity, equality, and inclusion

When compared with the institutional structure of the 8th district, the other case study researched in WP4, it is striking that the Újpest Roma MSG functions in a sort of ‘budgetary segregation’ as explained above. Moreover, the centre represents an isolated institution that conglomerates several different functions; including cultural, political, social, pedagogical ones. This creates a position that is visibly different from 8th district where there are many parallelly working institutions, public and civil organisations that perform the above-mentioned tasks and where, in contrast, the Roma MSG is much less powerful. As the interviews showed, the functioning and the good-governance of Újpest MSG and the RGYCC depends very much on personal relationships and on the embeddedness of its founder and director, Gábor István

¹⁶ According to Act CXXV of 2003 on Equal Treatment and the Promotion of Equal Opportunities, every municipality adopts a local equal opportunities programme every five years, which must be reviewed every two years. After 1 July 2013, municipal governments can participate in tenders co-financed by the national, EU or other sources if they have a local equal opportunities programme in force.

¹⁷ Decree of Ministry of Human Capacities 40/2018 (4 Dec) on the professional tasks of children's services and the conditions for their operation.

Molnár, who has gained widespread popularity and recognition over the years. This recognition is due on the one hand to the fame and good social position of her late mother, Gyöngyi Rác and on the other to his proper local history researches which have uncovered important parts of the social history of Újpest. According to Molnár, the way he keeps on having good relations and a solid credibility on both political sides (except the far-right wing party Jobbik) is basically an ongoing assurance to the sustainability of the centre.¹⁸

It is also important to highlight that the MSG and the RGYCC maintain a very active social media presence, where all the programs (let it be an event organised by the NőszíRom Club or an average afternoon at the Tanoda or even the arrival of a new book to the library) are immediately posted on the Facebook page of Újpest Roma MSG.¹⁹ This vivid online presence ensures the construction and the maintenance of a large virtual community that exceeds the geographical boundaries of Újpest and represents a main online meeting point for all Roma communities and their non-Roma allies.

Declaration of values that affect the operation of the MSG are set out in the 2012 Nationalities (Minorities) Act as follows: 'cultural diversity, linguistic difference is not a source of division but of enrichment'.²⁰ However, as István Gábor Molnár aptly pointed out, it is clear that most MSG 'have not read the law' and are therefore largely operating their organisations in a state of complete role confusion.²¹ The election process itself encourages most MSG members to function as a political representative entity, while at the same time it is legally mandated to perform cultural functions. This is reinforced by the funding practices of the state, which sees MSGs as a redistributive body for 'Roma affairs', with dedicated resources for social inclusion (Majtényi & Majtényi, 2017, pp. 131-136).

Despite the fact that the RGYCC does not appear in the Újpest's UDC or IUDS of 2015, it does contain statements of commitment to minority rights. The 2015 UDC sets an overarching objective: 'a district with a distinct identity: to maintain its local identity, which is made up of many elements, to strengthen the local patriotism of the population and thus cohesion between the different social groups' (pp. 8-9). UDC includes a sub-objective as well: 'Cohesive, solidarity-based community by fostering nationality [minority] culture' (pp. 28-29). In addition, the local equal opportunities programme (LEOP) 2023-2028 contains a value statement on equality:

Promoting equal opportunities helps to ensure that everyone has an equal chance to access good quality public and private services, to the right level of jobs, culture, education and other opportunities related to a meaningful human life. The principle of equal opportunities allows for the so-called positive discrimination, which gives preference to people from disadvantaged backgrounds in all areas of life, whether they are women or men, whether they are healthy or disabled, of different origins or financial status. (LEOP, 2022, p. 14.)

The LEOP, however, identifies the disadvantaged situation of the Roma population exclusively as a series of closely interrelated social and economic problems, in which cultural rights are neither part of the problem identification nor of the development opportunities (LEOP, 2022, pp. 67-68).

¹⁸ Interview with István Gábor Molnár on 6 July 2023.

¹⁹ The Facebook page of Újpest Roma MSG (<https://www.facebook.com/ujpesticigany>) has currently 3,500 followers.

²⁰ Act CLXXIX of 2011 on the Rights of Nationalities.

²¹ Interview with István Gábor Molnár on 6 July 2023.

Diversity, equality and inclusion, even if not reflected in institutional strategies - no such document exists -, permeate all the RGYCC's operations and frame its cultural actions. As Éva Váradi noted, their new initiatives, like NőszíRom Klub, are largely spontaneous and evolve without a written strategy or stated objectives and seek to avoid any administration that might surround them. She considers spontaneity - and thus lack of registered valuation and evaluation - to be the most important driver for the success of events. In addition, of course, they are aware of the number of spectators and carry out a lot of communication activities to ensure that the events attract a lot of people.²²

Evaluation systems

Evaluation and apprehension of the effects of cultural action are mainly informal. As at the level of strategies and objectives, there is no concrete record of the follow-up of the effectiveness and impact of cultural activities. The MSG must provide the municipality with a very concise semi-free-text synthesis of their activities in the Tanoda programme as it is a municipality budget line. It lists and describes the programmes (day care, career guidance, cultural, sport) and the number of participants. It basically has the format and style of a 'thank you for funding' letter (MSG AR 2015; 2016; 2017). What is striking is that these reports are not only about the extracurricular activities but mixed with community and cultural programmes, which are conceived as one in these reports.

In general, the municipality has not established a formalised follow-up/evaluation of the implementation of its cultural strategy, moreover in terms of cultural policy, the Roma MSG and RGYCC are quasi out of its scope. These circumstances in the 4th district gives more autonomy to the Roma MSG in the development of its cultural actions. As with the NőszíRom Klub, once the programme became a success, local and national politicians came on board as official supporters of the event.²³

The task-based government grant for MSGs has conditions for how the grant must be spent. They must cover the following activities:

- administrative activities of MSGs;
- provision and support of nationality (minority) public functions;
- provision and support of nationality (minority) media;
- public culture - development of community and social participation;
- public culture - promotion of traditional community cultural values; expenditures declared under the governmental function of education.²⁴

²² Interview with Éva Váradi on 6 July 2023.

²³ Interview with Éva Váradi on 6 July 2023.

²⁴ Act XXV of 2022 on the 2023 central budget of Hungary, annex 10 (Rules on task-based support for municipal and regional MSGs).

Conclusion

A lot of these local MSG come to us saying they want to do it at their place. I keep saying that, how it came together step by step. [...] It depends on personal relationships, it's nothing to do with the law: if we don't do anything, nothing happens at all. No one will hold you to account, officially or otherwise. The MSGs are 'kindergartens', which we've started to take seriously: invoking the law. They [municipality or national level politicians] don't read it either. They scratch their heads: 'well, so be it.' That's it!²⁵

The above quote from István Gábor Molnár also illustrates the context in which no evaluation system exists to monitor cultural actions, and decision-makers are not even aware of the cultural policy or minority policy backed by law. This gives a certain degree of autonomy to the few volunteers who maintain and develop this institution, which initiates cultural actions significant not only locally, but also for Budapest and even nationally.

Only individual perceptions testify to the effectiveness and impact of cultural actions. The interviewees were also reluctant to have formalised evaluation systems, both because they would take up a lot of their time and creative energies, which would ultimately affect cultural activities, and presumably because it would reduce their autonomy.

²⁵ Interview with István Gábor Molnár on 6 July 2023.

1.2. Case 2: Glove Factory Community Centre (8th district of Budapest)

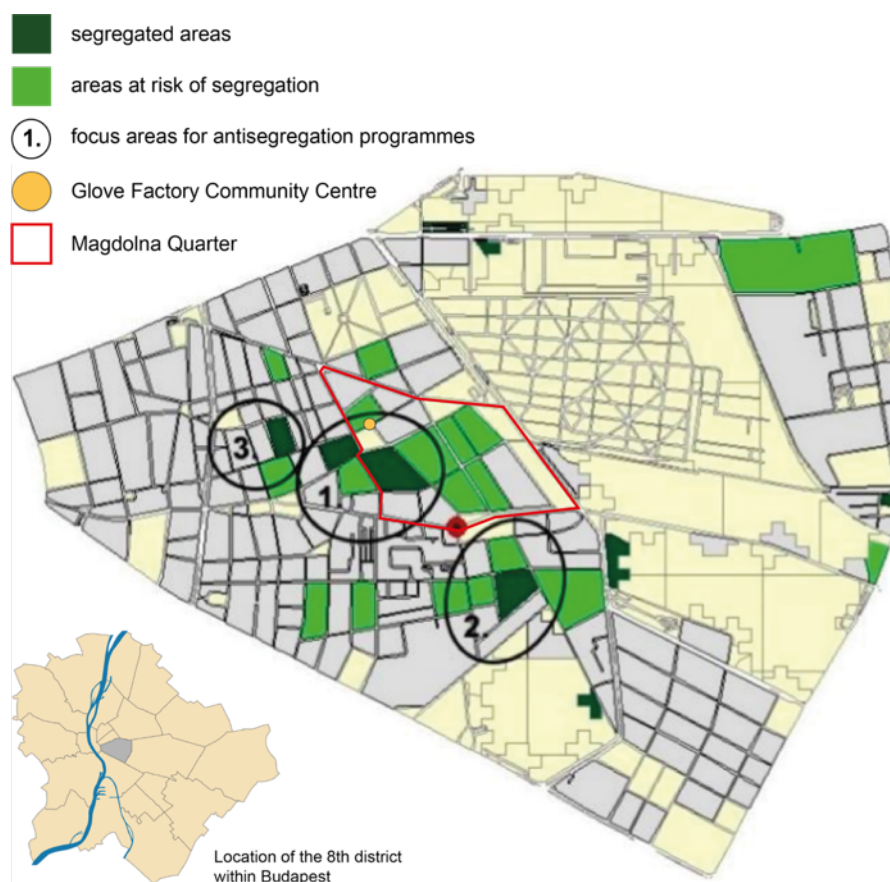
Presentation

The case study focuses on the more recent activities of the Kesztyűgyár ('Glove Factory') Community Centre (hereinafter referred to as GFCC) and analyse the policies, strategies, and evaluative practices that have been running either since 2019 or since the founding of the centre, 2008.

GFCC is located at the centre of one of the most segregated and stigmatised urban neighbourhood of Budapest, in the Middle-Józsefváros, in the 8th district, which, despite of its long-lasting image of a 'dangerous place', is only about 15 minutes from the city centre. Due to the social and ethnic policy of State Socialism, best summarised as a forced assimilation of Roma communities, as well as to the highly centralised and bureaucratic housing allocation system that reserved substandard public housing of Józsefváros for large low-income families, the social composition and status of this urban area radically changed by the 60s and the district began to be associated with poverty, Roma communities, prostitution and drug abuse (Keresztély, Scott & Virág, 2017, p. 1083). Despite various plans for local rehabilitation during the state-socialist era, the district remained practically untouched until the 1990s, when its status became critical, experiencing the most worrying tendencies of urban marginalisation in Budapest.

While municipal and state support to tackle the endurance of 'slums' was very weak and slow throughout the 1990s, in 2004, the EU accession opened up a new opportunity for funding, which meant a new, supra-national scale in urban governance. In the case of Middle-Józsefváros, EU funds have had an overwhelming role in the regeneration of the most marginalised and segregated neighbourhoods is the Magdolna Quarter Programme (MQP) (Czirfusz, Horváth, Jelinek, Pósfai & Szabó, 2015, p. 64). The MQP was Hungary's first truly integrated socially sensitive urban regeneration program initiated by the Municipality of 8th district that addressed not only the usual renovation of old housing stock but also the mitigation of social problems. The program consisted of three phases: the first one between 2005 and 2008, the second between 2008 and 2010, and a third one that finished in 2015. It consisted of several sub-programs focusing on refurbishment of municipal owned housing stock and semi-private condominiums, renewal of public spaces, implementation of crime prevention actions, the set up of social as well as employment program and last but not least, the realisation of a community building at the heart of the Magdolna neighbourhood, at the Mátyás square, the GFCC (Alföldi, Benkő, & Sonkoly, 2019, p. 161).

Figure 1 Location of the 8th district within Budapest (left). Segregated areas and areas at risk of segregation delimited by the segregation index²⁶ based on 2011 census data (right)



Source: UDC PS 2019, p. 76.

The opposition's victory in the 2019 municipal elections²⁷ has radically changed the district's cultural urban development strategies. Among many new political features, radically differing from the previous conservative / right-wing leadership (2009-2019), the municipality has set up a participation office and launched a number of socially sensitive programmes to increase social and cultural integration and promote cultural diversity. After years of very low-key operation and hosting many outside paid programmes, the GFCC essentially changed its role and became again a central institution in the organisation and realisation of culture-led urban regeneration practices.

The GFCC operates within the public benefit non-profit company 'For the Communities of Józsefváros' (*Józsefváros Közösségeiért Nonprofit Zrt.*, hereinafter referred to as JKN) which organises the public cultural life of the district in accordance with the public service contract

²⁶ The segregation index is defined on the basis of the share of those with no more than primary education and no earned income in the working age population (15-59 years). In the inner districts of Budapest:

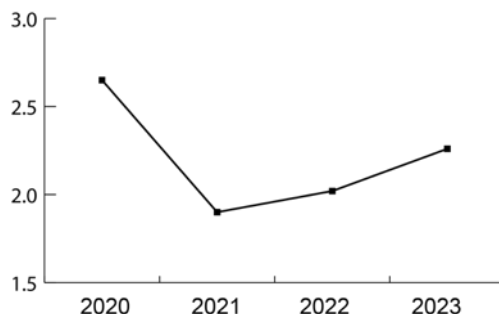
- the segregated areas are where the segregation index value is greater than or equal to 20%;
- the areas at risk of segregation are where the segregation index value is greater than or equal to 15% but less than 20% (Gov. decree 314/2012, annex 10).

²⁷ Since 2019, a five-party coalition (liberals, socialists, ecologists) has governed the municipality with two-thirds majority, with an NGO-nominated mayor. Between 1990 and 2009, the liberals and the socialists ran the municipality together.

with the Municipality.²⁸ The JKN is responsible for cultural, educational, community and public/local democratic functions: camp holidays and summer recreational activities for children, social care services (donations management, employment facilitation services, school preparatory and extracurricular trainings, courses); local public cultural activities, local cultural heritage preservation activities; running a local public newspaper, PR, communication; venue management for sports and leisure activities and for events organised by minority self-governments. As of 2023, JKN manages 13 sites, including the GFCC building and is divided into five departments: Operational Directorate, Community Directorate, Programme Management Directorate, Józsefváros Newspaper Editorial Office, Józsefváros Museum. The GFCC is one of the three institutions managed by the Community Directorate, together with two other institutions, Fókusz Community Space and the Zsendülő Centre (JKN PSC, 2022, p. 2-3; JKN BP, 2022, p. 3-5).

JKN's budget for 2023 is ca. 960 million HUF (~2,59 million EUR), of which ca. 830 million HUF (~2,24 million EUR) has been compensated from the municipal budget. The rate of compensation is 2.25% of the total budget of the municipality. JKN underwent continuous reorganisation of structure before the political leadership change, so changes in budget figures are only tracked with the incumbent municipality since October 2019 (See *Chart 1*). The chart shows the decline in the years of the COVID-19 pandemic and the reorganisation in 2020-2021 involving the closure or conversion of sites and functions (Flag Museum, Józsefváros Gallery, H13) or transferring certain responsibilities to other municipal departments/companies.

Chart 1. Rate (%) of municipal compensation for JKN as a proportion of the municipality's total budget, 2020-2023. (Based on publicly available data, created by Gábor Oláh).



Source: JKN BP 2022, p. 6;

<https://jozsefvaros.hu/atlathatosag/koltsegvetes/>; <https://koltsegvetes.jozsefvaros.hu/>

In general, we might say that the main target audiences of the GFCC are the underprivileged children and youth living and / or studying in the neighbourhood but besides this more or less defined age group (between 6-18 years), the community centre organises social and cultural activities for all age groups, including babies and their mothers (Fókusz Community centre), adults and elderly people. As for the disadvantageous social status of the public, there is a wide range of disadvantages within the local population, characterised by ethnic diversity and rapid changes because of a constant mobility. According to census data from 2013, 47% of the local population was supported by the social care system. 20-30% of the households are Roma. From

²⁸ The JKN does not cover the whole cultural life of the 8th district: the Community Participation Office and the Communications Department in the Mayor's Office also carry out cultural actions.

5500 housing units, 40% of them were public housing with low levels of comfort (Keresztély, 2017). Basing their strategy partially on the Urban Development Strategy, the GFCC focuses mostly on children and teenagers but has a wide range of cultural and social programs for all age groups. Interestingly, it can be noted that even if the area is still segregated from several aspects, there have been a lot of improvements and changes since the implementation of the MQP. In terms of local population, a slow gentrification may be detected with more middle-class inhabitants, which also signifies a certain social awareness among intellectuals / young middle class population who are consciously choosing to live in the neighbourhood and participate in the programs of GFCC.

Image 1. 'Melodies of Mátyás Square' music festival in front of the Glove Factory Community Centre.



Source: jozsefvarosujsg.hu

In general, the two main social problems that GFCC is trying to solve or at least mitigate are:

1. educational segregation (early school dropout and exclusion of disadvantaged / problematic children from high school because of the lowering the compulsory school age to 16).
2. disadvantaged position of the local population at the labour market.

In the following, we are enumerating a few programs and actions that the GFCC is offering to its public in relation to the above-mentioned problems:²⁹

²⁹ Interview with Zita Csőke, Director of JKN Community Directorate, Professional Director of Glove

- **Padtárs Mentor Programme and Zsendülő Extracurricular Learning centre ('Tanoda')** (initially by the Jesuites, 'School of Love'): These programs cover individual and in-group after school mentoring, after-school learning and other activities, (including special traditions, such as community gardening, discussion circles, museum pedagogical activities, excursions, summer camps), directly addressed for disadvantaged children (with very diverse disadvantages: migrant children with different linguistic background, Ukrainian refugees since 2022 and Roma children). There is only a small number of volunteer teachers and a few paid teachers (caused by the lack of strong civil society and culture of volunteering in Hungary, here we find in general university students of retired teachers). Concerning the question of interoperability between the different programs: at first, the children participating in the mentor program did not attend any other programs but there is a gradual change in this.
- **Boxing and dance classes, fairplay football:** These are cultural / sport programs organised by external staff and independent organisations which cover training for beginners at mass sport level as well as specific training for competitions. Both programs are very popular.
- **Fókusz Community Centre:** This sub-organisation is focussing mostly on single mothers, offering them programs and special attention against loneliness and postpartum depression, Its main aim is to create solidarity and community building among young mothers / women and to provide a safety net (especially for women struggling with domestic abuse and poverty) by a regular presence.
- **Nagyecsed Roma Dance house:** Organised with live music (more expensive but worth the extra costs) and teaching one of the most popular and famous Roma folk dances³⁰, this is one of the most integrative cultural activities which emphasises that Roma folk dance is an organic part of Hungarian culture.
- **Summer Camp:** It is an obligation of the local municipality to provide programmes during the summer vacation so since 2020, this summer camp is organised in Orczy Park even if the park was privatised by the University of Public Service. Interestingly, there is a slow increase of middle-class children among the participants of the camp (compared to previous years when middle class was 'afraid' to send their children because of negative stereotypes) which shows an explicit sign of desegregation tendencies.
- **Open House concept:** This concept is an existing tool since the opening of the centre, meaning that the GDCC is open during daytime, so visitors (mostly teenagers) can use the facilities freely (computers, sports, board games, playstation, drama pedagogical activities). The staff may propose them different activities but it is not obligatory to participate in them, one can just sit on the canapé and spend their time there. With its very low threshold approach, it seems like one of the most important and efficient tools in community building.
- **Glove Factory Art Gallery:** Launched in 2021 with the Omara exhibition in the frame of OffBiennale Budapest (organising an art exhibition together with reading theatre, based

Factory Community Centre on 1 June 2023.

³⁰ The Hungarian and Gypsy Dance Traditions of Nagyecsed were listed on the National Inventory of Intangible Cultural Heritage in 2017.

(http://szellemikulturalisorokseg.hu/index0_en.php?name=en_0_nagyecsed_i_ciganytanc)

on the artwork of the painter Mara Oláh and the storytelling practices of Roma women)³¹, the gallery started as an experimental art space, but as it seemed that the contemporary art scene resonates very well with the social specificities of the neighbourhood, the exhibitions and the use of the Gallery space became permanent and are very popular up to this day. In 2023, the gallery offers a grant application for an art exhibition based on community participation and fortunately, there is already a very big number of applicants, with potential exhibitors who are in general coming from the neighbourhood or reflecting on the local space.

Methodology

Value qualification and requalification efforts can be observed in the cultural policy of the municipality after the 2019 elections, as reflected in the strategies prepared and adopted since then. This process has encompassed many areas of urban management and development, several of which, with a different focus, have attributed certain values to GFCC's activities. As GFCC performs cultural, social and community functions, the relevant positions, or even valuation statements can be found in several municipal strategy documents,³² for the whole district or for specific sectors, such as Urban Development Concept (2019), Integrated Urban Development Strategies (2008, 2015, 2020), Civic Strategy (2020), Concept for Social Services Planning (2021), Concept for a Child-friendly Józsefváros (2022), Equal Opportunities Programme (2022), Concept for participation (2022). The Concept for Public Culture is expected to be elaborated by 2023 (JKN BP, 2022, p. 7).

Three types of sources have been used to examine evaluation systems: JKN annual business plans/public service contracts (2022, 2023) and JKN Community Directorate annual reports (2020, 2021, 2022); interviews conducted in April-June 2023; Cultural Statistics Data Collection System (2009-2021).

Each year, JKN submits a business plan (*ex-ante*, internal, formal) to the municipality, on the basis of which a public service contract is concluded. These include strategic and budgetary information, professional planning of activities and quantitative and qualitative indicators of performance. The new management of the JKN Community Directorate started its work at the beginning of 2020, and from then on annual reports (*ex-post*, internal, formal/informal) are available, which provide information on the professional activities of the year, mostly in free text form and less in quantitative data.

Three semi-structured interviews were conducted with:

- Péter Lágler, CEO of JKN (street level bureaucrat) on 25 April 2023;
- Gábor Erőss, Deputy Mayor for Culture, Municipality of 8th District (elected official) on 15 May 2023;
- Zita Csőke, Director of JKN Community Directorate, Professional Director of Glove Factory Community Centre (street level bureaucrat) on 1 June 2023.

³¹ <https://archive.offbiennale.hu/en/2021/program/1-program-romamoma.html>

³² <https://jozsefvaros.hu/otthon/onkormanyzat/strategiak/>

The Cultural Statistics Data Collection System (KultStat) helps to provide the mandatory cultural statistical data required by the law (*ex-post*, external, formal). Data on community centres are available in the thematic report on 'public culture'.³³ In the case of the 8th district, the data reporting has been carried out by the municipal company managing the public institutions (since 2015, by JKN) during the period under review, i.e. GFCC level is not reflected in the reports. Annual reports have been available in KultStat since 2009. The scope of data collection is largely based on yes/no questions, as well as quantitative and factual indicators. From these, we examine indicators over a fifteen-year time horizon that focus on inclusion (programmes and training targeting a particular generation, accessibility for people with disabilities) and on diversity (public cultural tasks for minorities, embeddedness in local society).

Since 2019, in its reports, based on the law, KultStat listed the following basic public cultural services:³⁴

- promoting the creation, support and development of cultural communities, providing public cultural activities and venues for cultural communities;
- developing community and social participation;
- providing conditions for lifelong learning;
- providing conditions for the transmission of traditional community cultural values;
- providing conditions for amateur creative and performing arts activities;
- providing conditions for talent care and development;
- culture-based economic development.

It is worth briefly discussing 'public culture' (*közművelődés*)³⁵ as a broad category in the context of cultural policy in Hungary. This is mainly associated with the areas of the public services, affecting inhabitants/citizens or the society as a whole and conceptually minimally refers to the importance of their voluntary participation. It covers all activities linked to the cultural state of the society, as well as to the acquisition and development of culture. While the concept emerged and institutionalised with the democratisation efforts of culture since the 1970s, the abovementioned top-down sense of the concept lies in the mission of transferring intellectual and cultural values to the 'working masses' through an extensive network of public institutions of cultural/cultivational functions (houses of culture/community centres, libraries, museums, public collections, etc.) that characterised the state socialist system before the democratic transition. Public cultural activities encompass cultural, educational, recreational, informational and community-related activities, outside the formal educational system, provided by public

³³ KultStat (<https://kultstat.oszk.hu/#/home>), a web-based service operated by the National Széchényi Library, is the mandatory cultural data reporting system for budgetary bodies, social and civil organisations, foundations, public foundations, business entities, companies and individual enterprises carrying out public cultural activities as core tasks. Data is collected along themes, such as public culture, zoos, libraries, museums, contemporary exhibitions, theatres and dance companies, concerts.

³⁴ 20/2018 EMMI Decree on the requirements for basic public cultural services, public cultural institutions and community venues.

³⁵ *Közművelődés* can be translated as 'public culture' or 'general education', yet we use the former in this study.

institutions, and integrate them into the life of the local community (Maróti, 1968, UNESCO, 1974, p. 15; Vitányi 1975, p. 35.).

Findings

Connection with values of diversity, equality, and inclusion

In the case of Glove Factory, there are very direct and evident links to the cultural values that are in the focus of WP4. As one of the main physical results / principal places of the MQP, the GFCC symbolises the geographical and symbolic centre of the first socially sensitive urban renewal project of Budapest, where social participation was designed as a key element of the programme. Since then, Magdolna neighbourhood became a label for 'social urban rehabilitation' in professional discourses as, in opposition to traditional urban renewal practices, stressing in principal physical revitalization of urban areas, it aimed to achieve the complex integration of underprivileged neighbourhoods through diverse social, economic and cultural programmes (Keresztély, 2017). In an urban area that is characterised by social and spatial segregation, high ratio of unemployment, ethnic diversity (with a large percentage of Roma population, as well as various migrant groups from Africa and Asia, accompanied by refugees from Ukraine since 2022), the need for a community centre that tackles social inequalities and empowers integration was highly perceptible.

Image 2 Glove Factory's children's day event on 26 May 2023



Source: <https://www.facebook.com/kesztyugyar>

The long-term vision of Józsefváros has community building and population preservation as its top priorities and helping people in deprived areas to achieve social cohesion and self-sustainability. In the long-term, the district will be an inclusive environment, culturally diverse and populated by

active communities, which will be a good quality of life, a healthy living environment, and an economically strong and diverse environment for its residents and businesses. (UDC 2019, p. 5; IUDS 2020, p. 20.)

In 2019, the values of diversity, inclusion or even equity were included in the Urban Development Concept (UDC)³⁶ adopted under the previous, Fidesz-led municipality. However, it can be observed that its underlying interpretations are the relevant ones that ultimately underpin an exclusionary socio-demographic policy. The aim was to orient the actions towards an 'active, self-managing, self-sustaining and solidarity-based society'³⁷, and even to 'improve the relative under-representation of those with higher cultural capital' (UDC, 2019, p. 7; 14). The contradiction is obvious: while its stated vision is to keep inhabitants in place as a priority, it implicitly encourages gentrification processes. The same wording, the vision and values cited above, was also included in the new city administration's revision of the IUDS in 2020, but in a completely opposite interpretation, and with different translation into policies and concrete actions: the vision can be achieved through measures aiming to improve the quality of life for inhabitants by minimising population change (IUDS, 2020, p. 9).

The Magdolna Quarter three-phase urban regeneration programme set social, economic and environmental objectives. The initial social objective also included the creation of GFCC, whose main mission was 'to promote cultural diversity', 'to strengthen local community cohesion' through cultural and educational programmes (IUDS, 2008, p. 6). The 2015 IUDS envisaged a continuation of MQP³⁸, but the proposed scope of actions covered only social, employment, housing renovation and public security objectives, without any specific culture- or heritage-led priorities.

The creation of the GFCC in 2008 was therefore a combination of a strong social cohesion and community identity-led urban regeneration approach, with alternative cultural, educational and recreational methods as the means to promote it. Value strategies related to the GFCC were formulated in the 2008 IUDS as part of the objectives of the MQP Phase 2 (2008-2010) Community Development Programme:

The aim of the programmes is to promote local cultural diversity as an asset to local society and to strengthen local community cohesion. [...] Intercultural education and training programmes are a key feature of the Glove Factory. The training and education programmes provide heterogeneous groups with integrated pedagogical methods. The aim of the programmes is not to transfer knowledge in an objective way, but to convey the ability and need for understanding and inclusion to individuals from different cultural backgrounds. (IUDS, 2008, vol. 3, p. 11.)

In 2015, IUDS maintained its main objectives (building community, strengthening local identity) and its main target groups (children from disadvantaged backgrounds, families). However, the very strong statement about the GFCC's mission on cultural diversity or interculturality was not included in this document (IUDS, 2015, p. 88). A new element has been included in the 2020

³⁶ Urban Development Concept (UDC) is a long-term (15-20 years) document of urban policy, adopted by municipal resolution, to ensure the coordinated implementation of the development and to provide the basis for the urban development and planning documents.

³⁷ It is worth noting that in an earlier version of the UDC, in 2018, the term 'solidarity' was not included in this horizontal objective.

³⁸ Finally, in 2017, the programme was continued, thanks in part to ERDF funding, by merging it with another neighbourhood: the Magdolna-Orczy Neighbourhood Social Urban Regeneration Programme. The two neighbourhoods contain blocks that are classified as 'segregated areas' according to the terminology of the Central Statistical Office. (<https://kohesio.ec.europa.eu/en/projects/Q3958461>)

IUDS revision with the transformation of a former school building next to the GFCC into an integrated cultural and community space. The building would have served as a cultural incubator 'enhancing the cultural diversity of the district' (IUDS, 2020, p. 61). However, in early 2023, the government decided to reactivate the Compensation Act of the time of democratic transition (1991), under which the building was transferred from the ownership of the municipality to the Hungarian Pentecostal Church, free of charge.³⁹

As many other aspects and dimensions are connected to cultural practices and institutions in the district, this is particularly the case with the GFCC, societal values of culture are also addressed by sectoral strategies that do not have specific cultural policy objectives. The Civic Strategy (2020) sets out an important role for the municipality in showcasing and promoting the diversity of the district's values (p. 3). The Concept for Participation (2022) states that the explicit aim of the municipality's cultural and civic activities should be to strengthen community connectedness (p. 9). The Concept for Social Services Planning (2021) associates a crucial role to GFCC in organising public cultural and educational programmes for socially vulnerable groups (p. 69-72). The Concept for a Child-friendly Józsefváros (2022) foresees public cultural actions (museum pedagogy, promotion of reading books) to increase access to high-quality education, as well as to culture and heritage (p. 33-38). Among other things, the municipality is willing to guarantee equal access to public services, such as public culture, through the Local Equal Opportunities Programme 2023-2028 (2023), aiming mainly at people living in extreme poverty and Roma, children, women, elderly people and people with disabilities. It will also take non-discrimination and non-segregation measures, as well as actions to ensure appropriate representation of minority communities (p. 5-6).

Value statements also appear during the evaluation situations, i.e. in designated evaluation documents (e.g. JKN business plans, annual reports), by applying concretely to a given cultural action, with vaguely defined degrees of effectiveness. The actions are thought through along the lines of value selections, in other words, values frame the actions in these semi-formalised documents (Heinich, 2020, p. 89). Concrete expressions of promotion of cultural diversity are found in the 'culture mediator programmes' (Roma dance house) or in the cooperation with minority self-governments (free use of JKN facilities for their events). The expression of inclusion is also explicit in several programmes (JKN BP 2022, p. 31-44). The concepts of equality and equity are also explicitly stated in the GFCC's annual reports related to social, political and cultural rights, in particular in terms of accessibility and affordability (GFCC AR 2021, p. 7-11).

Based on the examined documents, the most visible strategic function of the GFCC and the most important value principles that frame its actions are social inclusion and cohesion, as well as identity/community building. These can be understood within a complex social policy where culture and cultural heritage are considered to have major and multifaceted impacts on society. In the following, we examine how the GFCC and the JKN perceive their impact, i.e. what axiological competences they demonstrate and what forms of evaluation they mobilise to apprehend the effects of cultural action. This requires observing and describing different moments in the process of valuation and evaluation where formal and informal evaluation systems are intermingled. We focus on activities and actions in which valuation principles become explicit.

³⁹ https://hvg.hu/itthon/20230208_Epuletek_szazai_kerulhetnek_ingyen_az_egyhazak_tulajdonaba; <https://jozsefvarosujisag.hu/igenyt-tart-a-punkosdista-egyhaz-a-lakatos-iskola-epuletenek-egy-reszere-es-meg-is-kell-kapja-ingyen/>

Evaluation systems

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. For example, the approach known from project management literature, which follows implementation through milestones, is interpreted mainly in an ordinary sense in the JKN business plan for 2023, such as 'milestones in the life of the Community Directorate' (p. 39). The formalisation of the documents does not seem to have been accompanied by the acquisition of project management skills and approaches. As a consequence, there is little evidence of real evaluation processes in these formal evaluation systems.

The JKN business plan for 2023 identifies different categories of target groups, i.e. those who benefit from GFCC's cultural actions at different levels, so they distinguish between the various degrees of effectiveness. Accordingly, the levels are as follows (p. 28):

- primary:
 - Magdolna, Orczy, Csarnok (Market Hall) Quarter residents as 'daily users';
 - residents of other quarters in the 8th district;
- secondary:
 - Budapest residents from other districts;
 - professional visitors from Hungary;
 - professional visitors from around the world.

However, later, this various degrees of effectiveness between target groups disappears and only information on primary users is available.

The number of participants in programmes/events is the primary measure on which KPIs are intended to be established. Accordingly, for some cultural actions they would like to maintain the level of attendance achieved so far (e.g. summer camp, Zsendülő Centre, GFCC events), while for others they would like to see an increase (e.g. Padtárs Mentor Programme) (JKN BP, 2022, p. 39). The vaguely formalised wording of the KPIs also shows that this list is mainly for administrative purposes, with no real evaluation role. Of course, this does not mean that it is a 'plan made for the drawer', but is tacitly still considered as a bureaucratic constraint because they seem to be less able to quantify the effectiveness of their activities with hard indicators.

This formalisation constraint and the implicit 'resistance' against quantitative KPIs, paradoxically make these documents sources for qualitative evaluation information, attitudes and practices (GFCC AR 2021; 2022; 2023):

- information on who, how and why they participate in a programme or an event;
- information on the social status and age of the participants;
- information on specific social groups who deliberately have not participated;

- information on how the activities of the participants have changed the pre-planned programme;
- information on difficulties, including emotional challenges (frustrations, fatigue);
- Information on user requirements for specific programmes;
- information on perceptual and qualitative evaluation of the success of cultural activities.

Certainly, these types of qualitative information are in free text which are contingent, non-standardised, and vary from one programme to another, from one annual report to another. In any case, it reflects a perception or, even more so, an intention to apprehend the effectiveness and impact of cultural actions in a qualitative way.

By examining the KultStat database, we can get a much more reduced view on cultural activities, which is based on the responses on quantitative and yes/no questions provided by the institutions. Basically, we could record multi-year data on visitor numbers from 2009 onwards, but as the JKN's responsibilities have changed a lot in almost fifteen years, there is not much valuable information to be found. We can look at the category 'public cultural tasks for minorities'⁴⁰ as an example of cultural diversity. This is supposed to refer to the public cultural activities provided to minorities officially registered in Hungary, but in fact it rather be interpreted as cultural actions organised jointly with minority self-governments. It is worth noting that in the JKN's post-2019 data, the Roma minority activity was answered with a 'no' – before that it was almost always 'yes' –, which is presumably explained by the fact that the Roma minority self-government sees itself as the 'opposition' to the district municipality and continues to have good relations with politicians of the previous, Fidesz-led administration as the JKN director noted in our interview.⁴¹ Therefore, despite the fact that JKN co-creates programmes with several Roma cultural NGOs, KultStat does not testify to this. In addition to the limitations of research information of KultStat, it is also important to consider the extent to which cultural institutions can extract information on their own impact and effectiveness. The interface is clearly not designed to do this, as it seems not to be user-friendly.

Conclusion

We are working to put a broad concept of culture - an anthropological understanding of culture - into practice. We are creating programmes that give us the opportunity to bring in the great diversity of the 8th district. We don't want to make the *curios* [in the sense of high culture] ordinary, we want to discover the many *curios* in our everyday lives that we don't even notice.⁴²

The above quote also shows that the 8th district of Budapest occupies a unique position in the cultural policy context of Hungary. There are many dilemmas for a district-level cultural policy

⁴⁰ Hungary has 13 minorities recognised by law, of which 12 were 'national minorities' (*nemzeti kisebbség*) and one 'ethnic minority' (*etnikai kisebbség*), the Roma, before 2012. After that, the terms national and ethnic minorities have been abolished and replaced by the unitary term 'nationality' (*nemzetiség*). There are 11 minority self-governments in the 8th district of Budapest: Armenian, Bulgarian, German, Greek, Polish, Roma, Romanian, Rusyn, Serb, Slovak, Ukrainian. (<https://jozsefvaros.hu/otthon/nemzetisegi-onkormanyzatok/>)

⁴¹ Interview with Péter Lágler on 25 April 2023.

⁴² Interview with Péter Lágler on 25 April 2023.

in a relatively small area where radically different socio-cultural groups live side by side.⁴³ The incumbent leadership of the 8th district has set out to deliver complex cultural actions to address this diverse context that are framed by the values of diversity, inclusion and equality, among others. The visions and value attributions for the GFCC have been captured in different urban development and sectoral strategies, according to the range of the mission that is intended for this community centre.

According to the documents and interviewees, the self-evaluation of the social impact and effectiveness of the GFCC's cultural actions is not well developed. Nevertheless, the need for 'honest' evaluation systems has been expressed. Based on the analysis, three conclusions can be drawn regarding the underdevelopment of evaluation systems:

- no or very little information is formally required at both governmental and municipal level;
- the staff of cultural institutions do not consider themselves to be adequately prepared to develop and manage an effective evaluation systems;
- it is seen as a complicated process to implement in Hungary, where hierarchical dependencies lead respondents to answer questions according to their imagined or experienced power expectations.

Yet the analysis highlighted informal evaluations that appear sporadically in the documents and interviewees' responses, but which nevertheless influence how cultural actions are planned. They also shed light on what information the actors would need when developing a possible more formalised qualitative evaluation system.

⁴³ Interview with Gábor Erőss on 15 May 2023.

2. Italy

2.1. Case 3: Mudec

Presentation

The Museum of Cultures (Mudec) is an ethnographic museum based in Milan focused on non-European populations. Mudec is one of the few public-private partnerships in the Italian heritage sector.

The partnership involves the Municipality of Milan (public actor), owner of the Museum's building and permanent collection, and 24Ore Cultura (private actor), a division of the publishing for-profit group 24Ore. The private partner is the tenderer of a 12-year concession contract for the use of the museum's spaces, which binds the concessionaire to pay an annual rental fee of €190.000 plus overhead costs, to organise at least two exhibitions a year about international cultures and to manage the communication of the museum and the educational activities. The public partner, instead, is in charge of managing the permanent ethnographic collection of the Municipality of Milan and of organizing exhibitions and public activities. In the last few years, the public actor experienced significant changes. In 2020, the Municipality established a new public art office to facilitate new urban art operations. The 'Art in public spaces' office is physically located in the Mudec's building and directly managed by the public partner. Also, in February 2022, the Municipality of Milan appointed a new director, who introduced a new museum's vision based on transversal programs combining exhibitions, public programs and connected initiatives under a unique theme. The first format under this new strategy was 'Rainbow', which will be investigated in this document.

Mudec has already been analysed in previous WPs: in WP2, we investigated the values of the actors involved and the related tensions, while in WP3 we focused on the Municipality's evaluative practices concerning participatory activities. For WP4, we investigate how the private for profit actor and the public actor respectively deal with inclusion, equality and diversity and how they make sense of impact in these areas, underlining the tensions emerging from the different interpretations of values and impact evaluation systems.

Methodology

The analysis is based on a qualitative approach, relying on materials collected during previous WPs as well as in the period from February 2023 to July 2023.

We analysed around thirty documents, such as press releases, financial statements, press articles, website contents, initiative programs and visitors' data. Some records were publicly available on the Internet, while others were provided to us by the partners. For our analysis, we also benefitted from the re-interpretation of selected interviews conducted under prior WPs, represented explicitly by the interview conducted in March 2021 with a public actor official, the interview conducted in April 2021 with a 24Ore Cultura's representative, and the interview conducted in August 2022 with a museum's conservator. In addition, during the current fieldwork, we conducted two focus groups of four hours each with the officials of both the private and public partners. Finally, we attended museum events as observers to collect data on the initiatives' contents and their organisation.

The Mudec's offer comprises a plurality of initiatives, which, in our view, can be divided into three categories: Exhibitions, Public Art and Outreach. For each category, we selected recent and representative initiatives organised by the private for-profit partner and the public partner (see Table 1).

Table 1. Initiatives

Category	Private for-profit partner	Public partner
Exhibitions	Machu Picchu (October 2022-February 2023)	Rainbow (February 2023- July 2023)
Public Art	Il Muro che Unisce (April 2021)	I Trenta, Flavio Favelli (April 2023)
Outreach	Teens Queer Voice (May 2023)	Black Art School Modality (May 2023)

We developed an interpretation scheme to analyse these initiatives concerning inclusion, diversity and equality, focusing on specific aspects: for inclusion, we focus on better understanding what is the target audience and the way it is involved; for diversity, we investigate the central theme of the initiative and the type of diversity addressed; while for equality, we focus on admission criteria, and specifically on the pricing policy, which are particularly relevant for this case study as they represent a significant factor of differentiation between the private and the public actor, generating tensions with other values in analysis. After addressing these issues concerning the selected initiatives, we focused on how the private and public partner assessed the impacts of each initiative, analysing the interplay between the different interpretations of values and systems of valuation adopted.

Findings

Exhibitions: Machu Picchu and Rainbow

For the category 'Exhibitions', we selected two recent shows organised at Mudec respectively by the private for-profit partner ('Machu Picchu') and the public partner ('Rainbow').

Machu Picchu

'Machu Picchu' was organised by 24Ore Cultura and held from October 2022 to February 2023. The show, curated by the director of the LARCO Museum in Lima, Peru, focused on Machu Picchu's citizens from the origins to the Incas and displayed a variety of artefacts, videos and immersive 3D reconstructions. The exhibition employs an edutainment approach, aiming to involve a wide and diverse audience composed of adults and kids.

To visit the exhibition, it was necessary to hold a € 17 ticket (unless it would be possible to benefit from reductions) and it was possible to pay an additional € 15 for a VR experience on Machu Picchu. The exhibition totalled 62.600 visitors. Besides the exhibition, 24Ore Cultura developed a public program called 'Anno del Peru' (Year of Peru) in collaboration with the public partner, involving Milan-based Peruvian communities, to foster the Andean culture through initiatives such as concerts, conferences and workshops for adults and kids.

In the view of the private for-profit partner, the exhibition fostered inclusion because it suited a broad audience, including adults and kids. As mentioned by the 24Ore Cultura Project Manager: 'We realised that on more research-oriented projects we had a low audience outcome [...] So we tried to veer the programming, to engage a wider number of visitors.' Also, according to 24Ore, their offer is inclusive because it succeeds in making challenging concepts understandable through an edutainment approach: 'we always tried to have an exhibition that was a bit more edutainment-entertainment, that could involve the audience of families and children' (24Ore Cultura Project Manager, interview 2021). The private partner believes that the exhibition enhanced cultural diversity by contacting a diverse Italian audience with a distant culture and allowing the Peruvian diaspora in Milan to connect with 'their' heritage. This was achieved, in particular, through the Year of Peru initiative. As stated in a press release: 'the year of Peru is a cultural project to bring us closer to the Andean culture that speaks to as a wide and varied audience as possible' (Mudec, 2022).

About equality, 24Ore Cultura charged visitors an entry fee of €17 (full price), which can be perceived as quite high, but that is justified, in the private partner's view, by the quality of contents and the costs to develop the show: 'They say that our pricing is high, but with more than 60.000 visitors we had just been able to cover our costs' (24Ore Cultura Project Manager, focus group July 2023). The private partner is bound to payment of a rental fee and the overhead costs. Also, it is essential to remember that 24Ore Cultura is part of a for-profit listed group, thus attentive to investment returns.

When asked about the impact of their activities, the 24Ore Cultura Project Manager confirmed that economic measures play a central role in their valuation system: 'We are a listed company, not a non-profit, and therefore we are required to meet economic targets. The concessionaire is making significant investments from an economic point of view and wants to see a return' (Focus group February 2023). Therefore, they look closely at the number of visitors to each exhibition and the related revenues. This is also confirmed by the analysis of the financial statements released by Gruppo 24Ore (Gruppo 24Ore, 2017, 2018, 2019, 2020, 2021, 2022), the for-profit company owner of the division 24Ore Cultura, where exhibitions are described only in terms of revenues generated and number of paying visitors.

The Project Manager of 24Ore Cultura also declared to undertake a profiling activity of visitors: they collect information on demographic characteristics such as age, gender, provenance, and estimate the number of returning visitors. They also declared to analyse the social media performances regularly, looking at parameters such as the number of followers, likes, sharings and comments, and evaluating the conversion rate of these interactions. Other impact measures are press reviews, podcast downloads, sale of catalogues and merchandise.

Rainbow

The 'Rainbow' exhibition was organised by the public partner's curatorial group and held at the museum from February to July 2023. It focused on different interpretations of the rainbow as a natural, cultural, spiritual and human phenomenon and included contemporary art pieces, scientific and historical artifacts, videos and photographs documenting the rainbow and related studies from different perspectives. The exhibition was free admission and totalled 36.100 visitors. Besides the exhibition, the public partner organised a public program, including conferences, workshops and educational events.

From the public partner perspective, the exhibition fostered inclusion because it offered visitors different layers of readability: 'It suits a wide audience, from kids, just fascinated by the colours of rainbow, to people with a scientific, anthropological and ethnographic background, able to read the exhibition's messages more deeply' (Contemporary Art Curator, focus group July 2023).

Also, the exhibition enhanced cultural diversity because it was a transversal show displaying artifacts from many different cultures: 'the anthropological part of the exhibition enhances cultural diversity, thanks to objects coming from around the world, such as Australia, China, Africa, South America' (Contemporary Art Curator, focus group July 2023). Finally, the exhibition ensured an equitable access for audiences, as it was free to visit.

When asked about the measures of impact of their initiatives, the public partner declared to monitor the number of visitors to their exhibitions. Also, they are interested in providing high quality contents: 'we are doing our best to develop our cultural mission in the long term' (Museum's Conservator, focus group July 2023), even if much work seems to have to be done to properly transfer their cultural commitment to the public: 'there is still a gulf between what we perceive as important and what the public considers important' (Museum's Conservator, focus group July 2023). They declared not to conduct profiling activity of their visitors, as it would be challenging for them to collect data given the fact that the exhibitions are free to visit (thus, it is not necessary to buy the ticket online). Also, they do not pay particular attention to the feedback on social media or undertake forms of user profiling (also given that the private partner manages social accounts). When we asked if there was any monitoring activities from the Municipality, they mentioned that they have the duty to report three times a year to the Municipality on the basis of two documents, namely the DUP ('Documento Unico di programmazione', tr. 'Single programming document'), which is a forecast report on the planned activities, and the SAP ('Stato attuazione programmi', tr. 'Status of project implementation'), which instead monitors the congruence between planned and implemented activities. This reporting activity is mainly directed to evaluate the performances of managers and directors of public organisations.

Public Art: Il Muro che unisce & I Trenta

Public art is an important activity for both the private and public partners. We selected two initiatives organised by each of them: for the private for-profit partner we chose 'Il Muro che Unisce' ('A wall to unite'), while for the public actor we selected 'I Trenta' ('The Thirties').

Il Muro che Unisce

'Il Muro che Unisce' ('A wall to unite') is a public art project developed by a Milanese local neighbourhood administration (Municipality 6) in collaboration with 24Ore Cultura. The initiative includes the realisation of two murals and aimed at renovating the San Cristoforo sul Naviglio area, an underprivileged neighbourhood close to the Mudèc museum (Figure 1).

Figure 1. San Cristoforo neighborhood



The project started in 2019, when Municipality 6 launched an open call for street art proposals, won by the artist collective 'We run the streets' with a project dedicated to the comics' character Valentina. The mural, realized in December 2019, represents Valentina touring the city's streets and ending her visit at Mudec (Image 1).

Image 1. Valentina's mural



24 Ore Cultura supported the project by promoting the initiative through editorial contents on the Mudec communication channels.

Two years later, Municipality 6 commissioned a new project to the same artist collective, who, in April 2021, realized a second mural dedicated to comics' characters Diabolik and Eva Kant. Also in this mural there is an explicit mention of the Mudec museum (Image 2). For this project, besides the communication support, 24Ore Cultura also provided a financial contribution. More specifically, in the context of an exhibition dedicated to Italian street artist TvBoy organised at Mudec, 24Ore Cultura asked the artist to develop a performance during which he realised an artwork. From this performance, the artist created thirty multiple artworks and donated them to 24Ore Cultura, which organised a charity auction, in order to sell the pieces. The auction's revenues were entirely donated to Municipality 6 in order to fund the new street art project. In addition to this, 24OreCultura involved a museum's sponsor which also financially contributed to the project.

Image 2. Diabolik and Eva Kant mural



According to 24Ore, the initiative is inclusive as it allowed to make culture closer to local citizens through street art language: 'a bridge between two Milan: the cultural one that must be more and more inclusive and the peripheral one already subject to major redevelopment, to accompany citizens to culture through the language of street art' (<https://www.mudec.it/ita/eventi-2/event/performance-tv-boy-al-mudec/>).

According to 24Ore Cultura, the initiative targets specifically underprivileged areas of Milan enhancing social diversity: local people not used to attend cultural environments got the possibility to enjoy art in their comfort zone, thanks to the support received by 24Ore: 'we donated the proceeds to Municipality 6, [...], which was the least cared for, least attentive part of the city' (24Ore Project Manager, interview 2021).

Focusing on equity aspects, public art is 'accessible' by definition: being positioned in the public realm, it is free to enjoy. However, for 24Ore it is essential to cover the costs of these projects, thanks to the involvement of sponsors or the realisation of ad-hoc projects, such as the TvBoy performance: 'we are not making money out of it, but at least we cover costs thanks to the involvement of sponsors' (24Ore Cultura Project Manager, focus group 2023).

When asked about the initiative's impact, the 24Ore Cultura's Project Manager declared that the intervention played an 'amplifying role' in the local area, activating a dialogue with communities, local networks and collaborations with local institutions. Also, given the fact that San Cristoforo sul Naviglio is very close to MuDEC, the art intervention promotes the museum among local people: 'if there is beauty outside the museum, your community is more enticed to follow the museum's own activities [...]' (24Ore Cultura Project Manager, focus group July 2023). Also, the private partner pays close attention to the return in terms of press review. To estimate the impact more closely, they are currently investigating the integration of plugs in the walls in order to count how many people pass by the mural, also to understand how the community converts this experience: 'do they photograph it? Do they share it on social media? Do they tag us? Did they understand that it is connected to our activities? These are all aspects that we aim to better understand' (24Ore Cultura Project Manager, focus group July 2023). Also, they added that another crucial indicator is represented by the development of partnerships with sponsors and of methods to cover the costs of these initiatives.

I Trenta

Within the 'Rainbow' program, the public partner developed 'I Trenta', a public art project organised by the 'Art in Public Spaces' office involving renowned artist Flavio Favelli. The public artwork was inaugurated in April 2023 and was intended as an external prosecution of the exhibition held at the museum.

The public art piece reproduces thirty passports from different countries of the world (Image 3) and reinterprets symbols and graphics of the covers of these documents: 'the passports suggest an imaginary journey outside the borders of Italy, while at the same time bringing up the themes of individual identity and the power of individual state administrations' (<https://www.muDEC.it/ita/2023/04/03/i-trenta/>). The choice of the nationalities of the passports was not casual, as the artist decided to represent the countries that most deny human rights.

For the public actor, public art represents an inclusive activity because it allows engaging communities also beyond the museum's walls, which, according to the museum's director (focus group February 2023), should be one of the missions of a museum: 'Museums and public art must act in a complementary way: museums arrive where public art does not arrive and viceversa'. This is also a result of the fact that, given the contract of concession that guarantees to the private partner the use of the majority of the museum space, the public actor has limited space for its activities: 'we seek to reclaim in outdoor spaces what is missing inside the museum' (Contemporary art curator, focus group July 2023).

Also, for the public actor, public art allows to enhance social diversity, offering underprivileged areas of the city visibility and engagement with art projects: 'The projects are oriented to a twofold flow: to offer network and visibility to realities and projects otherwise not very visible, but also to activate network's nodes on the territory, promoting cultural projects that, starting

from the places of culture, in particular Mudec, will involve the suburbs, place of residence and activities of “new citizens” (Milan Municipality, 2020). This also connects to equity, given that public art allows free access to art for everyone.

Image 3. I Trenta



These activities are aligned with the Municipality’s vision, which aims to engage underprivileged areas of the city thanks to social and cultural projects: *‘As for the Piano Periferie (Plan for the suburbs), Mudec will strengthen its vocation as a multicultural connector, also exploiting its “decentralized” position, which already represents an ideal bridge between the center and the suburbs’* (Milan Municipality, 2020, p. 306). This also allows to meet citizens’ needs, as highlighted by Mudec’s director (focus group, February 2023): *‘Now we have incorporated the Public Art Office, and it is very important for the territory: during Covid-19 the city made a call to the citizens asking how they imagined the city of the future [Milan project 2020: <https://www.comune.milano.it/aree-thematic/participation/milan-2020>] and among the results emerged the desire to have more art and culture in the spaces of proximity’.*

Outreach: Teens Queer Voice and Black Arts Movement School Modality

For ‘Outreach activities’, we intend initiatives organised by the museum to involve the audience beyond its traditional offer, such as educational activities or experiences within the museum. For comparability reasons, we decided to focus on educational activities. We selected the workshop ‘Teens Queer Voice’ for the private actor, while for the public actor we chose the ‘Black Arts Movement School Modality’. Both activities took place at Mudec in May 2023.

Teens Queer Voice

‘Teens Queer Voice’ was organised by 24Ore Cultura within the public program associated with the exhibition ‘Muholi. A Visual Activist’, focused on the work of South-African photographer Muholi, who is actively involved in the LGBTQ+ cause. Besides the exhibition, in May 2023, 24Ore Cultura organised a three-day workshop dedicated to teenagers to explore topics such as gender identity and current social transformations. The activity aimed to create ‘a safe space in which to engage with the themes the exhibition evokes from a personal, creative and sharing perspective’, (Mudec Facebook post, 15.05.2023). The workshop included participatory discussions on the issues moved by the exhibition, such as identity, belonging, self-perception, sense of community, body and relationship with society. The workshop was free to attend.

From the private partner perspective, this activity was inclusive as it aimed to get closer to the museum a target audience generally challenging to involve, represented by teenagers part of the queer community or interested in these issues: ‘it is a difficult target, they are not always interested in museums, it is important to provide experiences that closely talk to them’ (24Ore Cultura Project Manager, focus group July 2023).

The workshop also fostered diversity, demonstrating care for crucial issues, such as the LGBTQ+ aspects and the needs that result from them: ‘the organization of the workshop was for us a manifesto of our attention to this topic and the related identity issues’ (24Ore Cultura Project Manager, focus group July 2023). Being free, ‘Teens queer voice’ also allowed teens an equitable opportunity to access the museum activities.

When asked about the impact of this activity, the Project Manager of 24Ore Cultura declared that it allowed them to get feedback from a community perceived as difficult to engage: ‘together we made a poster that served at the level of giving back from the community toward the museum [...] sometimes we need feedback beyond ticket counting’ (focus group July 2023). However, she added that they experienced a negative impact in terms of press review: ‘it was very difficult to convey this activity to the press; much of the press responded to us that these are uncomfortable issues that they prefer not to deal with, at times we were even offended’.

The Black Arts Movement School

The Black Arts Movement School Modality Milano Session (BAMSM) was part of the public program associated with the ‘Rainbow’ exhibition and was held at Mudec in May 2023. It consisted of a five-day full-time workshop designed for students, artists, researchers, activists with a migratory background and all those interested in exploring the relationship between art, expression, and resistance in diverse cultural terms, such as art, music, poetry, fiction and theatre in the Italian and American context. BAMSM was inspired by the American Black Arts Movement School Modality, founded in Chicago by Romi Crawford, who co-organised the Milanese workshop. Key themes of BAMSM included the Black Arts Movement, the history of the Rainbow coalition, epistemic violence, and cultural appropriation. The daily schedule comprised performances, in-presence roundtables, lectures and discussions. The workshop was free to attend and was supported by a sponsor involved by the public partner. Around 35 participants attended the BAMSM.

For the public partner, the project fostered inclusion because it offered an opportunity to include in a museum’s activity a plurality of audiences: ‘We had a transversal and very motivated

public: we had many racialised people, but also people just interested in this peculiar topic' (Project Manager, focus group July 2023).

Also, focusing on blackness issues, it connects with cultural diversity: 'it recalled the movements of the Afro-descendant community in America in the 1970s, but at the same time connected with the most current issues concerning black movements in the arts' (Project Manager, focus group July 2023). BAMSM provided an equitable opportunity for diverse targets of people, being free to attend.

When asked about the initiative's impact, the public actor recalled the relapse in terms of knowledge dissemination: 'many attendees were all somehow involved in education: we had teachers, researchers, curators, museum guides' (Project Manager, focus group July 2023). The public actor is very interested in spreading this knowledge, and they are currently working on podcasts and youtube videos. Another important measure of impact was the knowledge acquired by the public actor itself: 'there has also been a significant impact for us as a municipal office; we gained more awareness about important dynamics, especially about eurocentrism and the way we present artifacts, which will be useful for our activities in terms of modus operandi' (Contemporary Art Curator, focus group July 2023). For example, this triggered a new vision for an ongoing project on colonial odonymy in Milan. Also, for this project, they valued the impact in terms of the participants' personal experience: 'we know what the impact was for those who were there, what happened in those days was strong, touching, we are sure it left a mark' (Project Manager, focus group July 2023).

Discussion

Regarding RQ1

Overall, we see differences in the interpretation of the key values addressed in this WP, as well as tensions between them (RQ1)

The private for-profit partner intends inclusion as providing initiatives that can be indistinctly enjoyed by various audiences, such as adults and kids, thanks to an edutainment approach. This results in the opportunity for different targets to attend the initiatives, whose content can be easily understood by most people. The public partner, on the other hand, provides an additional facet of inclusion by offering different layers of readability, thus allowing a light reading for kids and those not willing to go in more depth and additional enriching insights for those more attentive to specific themes. This difference can be perceived in relation to the 'exhibition' category and the public art initiatives. 'Il Muro che unisce' is a more 'popular' street art intervention and represents a simple storytelling of famous comics characters. Conversely, 'I Trenta' by Flavio Favelli is an artwork that can be enjoyed for its aesthetic value and symbolic meanings.

Also diversity is perceived quite differently by the private and the public partner. For 24Ore Cultura, diversity is intended in a binary mode: for each initiative, they address a specific form of diversity, such as an international culture in the case of Machu Picchu, underprivileged neighborhoods and citizens in the case of 'Il Muro che Unisce' and LGBTQ+ issues in the case of 'Teens Queer Voices'. The conception of diversity is instead more transversal in the public partner's view: 'Rainbow' includes different kinds of diversity, from the blackness movements ideology to the artifacts of many different cultures, while BAMSM addresses the issue of

'blackness' providing many angles and involving issues such as gender disparity and unequal representation.

In terms of equity, the private and public partner approach is different, given the diverse business models that drive them. 24Ore Cultura charges a pretty high entry fee for the exhibitions. In contrast, for other initiatives, such as public art or outreach, even if provided free of charge, they need to cover the related costs thanks to the involvement of financial partners or through the organisation of fundraising activities. For the public partner, instead, access to culture is always provided free of charge, and there are never economic purposes involved.

About the system of values, we can identify tensions between inclusion and equity for the private partner about the exhibition category, as the price to access the shows can be perceived quite high by part of the audiences. Oppositely, we can see coherence between the inclusion and equity conception provided by the public partner and for the other categories of initiatives (public art and outreach) provided by the private partner.

Regarding RQ2

Differences can also be observed at the level of the impact evaluation systems in place (RQ2). The analysis of the initiatives put into light different layers of impact-related discourses.

The first discourse revolves around adopting a quantitative and short-term impact evaluation system. This perspective emerges from the analysis of the activities organised by the private partner, evaluated through quantitative parameters such as the number of visitors and the related revenues to satisfy the economic logics that drives the concessionaire. However, the public partner also pays attention to the number of visitors, mainly to legitimise what they have done.

The second impact-related discourse characterises mainly the public partner. It relates to how initiatives contribute to a longer-term cultural mission, sometimes embedded in public policy programs (i.e. the plan for the suburbs).

Another significant discourse on impact is represented by what partners can learn from each initiative. For instance, discussions during workshops and community feedback provide the partners with valuable knowledge for future planning.

Interestingly, public art projects' impact is discussed from all three perspectives. Public art projects allegedly impact museum visitors, show the museum's contribution to public policies, and provide knowledge on how to interact with local communities.

Even if public art projects seem to bring the private and public actors closer, the partners' perspectives are still diverse and very far from each other, as demonstrated by their respective interpretations of values and the different evaluation systems in place. This results in internal fragmentation, in a partnership that needs to be more efficient and in marginal forms of collaboration.

2.2. Case 4: Austrian Pavilion at the Venice Biennale Architecture 2023

Presentation

The Venice Biennale is an international exhibition organised by the private not-for-profit foundation La Biennale di Venezia annually. The annual focus of the exhibition alternates between art and architecture. The main exhibition is held in the Arsenale and the Giardini areas, two historic sites owned by the Municipality of Venice and given in concession to the Biennale for the entire year (a 30-year agreement was renewed in 2015).

Every year the Biennale's board of directors appoints a curator who decides the exhibition's central theme. Next, the Biennale's contents are developed at the national level. Each country appoints its curator through open call or direct appointment and proposes a national project to be shown in its pavilion. The Biennale oversees the activity of around 80 national pavilions, spread mainly in the Giardini and Arsenale areas, plus a small number spread throughout the city. Among the participants, there is also the Austrian Pavilion, on which this case study focuses.

The Austrian state owns the Austrian Pavilion, which the Arts and Culture Division of the Federal Ministry for Arts, Culture, Civil Service and Sport of Austria manages. It is located in the Giardini, where 28 other national pavilions are based.

For the Biennale Architecture 2023 theme 'The laboratory of the future', the architects' collective AKT proposed the 'Beteiligung/Participation' project for the Austrian Pavilion. The project consisted of modifying the Pavilion's entrance to provide free access to citizens in half of the space. In contrast, the other half of the Pavilion would have followed Biennale rules (the visitors pay a €25 ticket to entry to the Giardini and Arsenale areas, including access to all national pavilions). Although the project won the national-level selection to represent Austria at the Biennale, it was strongly criticized by the Biennale and deemed unfeasible. This led to a deep change in the original proposal. As we shall see, the initiative provides a unique angle to reflect on inclusion and equality, to explore the evaluation systems adopted by different actors and the tensions emerging between them.

Methodology

The analysis adopts a qualitative approach, relying on documentary sources, such as reports, press releases, website contents, press articles, meetings memos and social media analysis. Some documents were publicly available on the Internet, while others have been provided to us by the Pavilion's representatives. We also conducted non-participant observation at events such as press conferences, the Pavilion opening, an interview with one of the Pavilion's curator, and other initiatives within the Pavilion's program. Also, an essential source of information was represented by the exhibition catalogue, to which one of our research group members contributed (Mancuso, Menichelli, Zan, 2023).

Based on the sources described above, we analysed the initiative from the proposal to the outcome, investigating the role played by each actor throughout the process. More specifically, we first analyse the original project, the reasons that triggered it, and the related process. Following this, we describe the negotiation process with the Biennale and the Superintendence,

which brought a rejection. Finally, in the last part, we analyse the project's outcome and impact, reflecting on the evaluation systems adopted by the interplay of actors. We exclusively focus on inclusion and equality for this case study, as diversity is less relevant in this context. To analyse these values, we adopted the same scheme used for the Mudec case study: for inclusion, we focused on better understanding the target audience and the way it is involved. In contrast, for equality we focus specifically on the pricing policy. After having analysed the process, we focused on how distinct actors, namely the Austrian Pavilion and the Biennale, assessed the initiative's impacts, exploring the emerging interplay between the two perspectives.

Findings

The proposal

For the first time, for the 2023 Venice Architecture Biennale, the Austrian Federal Ministry of Arts and Culture, Civil Service and Sport launched an open call to select the project that would have represented Austria at the exhibition.

AKT a seventeen-member architecture collective based in Vienna, involving also the prominent Austrian architect Hermann Czech (b. 1936), submitted a proposal that strategically exploited the position of the Austrian Pavilion. The Pavilion is located nearby the northeastern boundary wall dividing the Giardini area of the Biennale from the Sant'Elena Venetian neighbourhood.

The 'Beteiligung/Partecipation' proposal was built around two key elements. First, the pavilion would have been divided into two parts: one accessible only showing the €25 Biennale ticket, and the other freely accessible to anyone, including ticket holders. Second, a temporary gate would have been opened in the perimeter wall dividing the Giardini and the Sant'Elena Venetian neighbourhood to allow access to the free section of the Pavilion. Also, AKT planned to hand over the free area of the Pavilion to the local people for gatherings and events. To develop the project, AKT and Hermann Czech closely collaborated for more than a year with people from the Sant'Elena district, local activist associations and researchers. The Pavilion would have become a symbol of inclusion: 'not a one-side polemic, but a critical exchange about the current state of the inhabited city and the Biennale's possible supportive role in terms of its future' (AKT and Hermann Czech, 2023, p. 21).

The proposed project explicitly tackles the issues of depopulation and over-tourism in Venice, particularly the responsibilities of art institutions such as the Biennale in these processes. As the architects wrote, 'architecture must, above all, deal with the relationship between public and private, accessible or inaccessible, communal or individual' (AKT and Hermann Czech, 2023 p. 11).

The catalogue strategically contrasts two numbers that present the proposal's rationale. On the one hand, in 2022, the number of Venice's inhabitants fell below the 50.000 threshold, in a process of depopulation caused by 'economic exploitation of the city's space, the associated processes of spatial displacement and the loss of essential infrastructure' (AKT and Hermann Czech, 2023, p. 15). On the other hand, in 2022, the Biennale welcomed 800.000 paying visitors (sixteen times the remaining population of Venice).

Also, the collective of Austrian architects criticized the implicit privatisation of the Giardini and Arsenale. Although the Biennale lasts a semester, and the setting-up/dismantling processes require a few weeks before and after the exhibition, people external to the Biennale

organisation can't use the spaces in other periods of the year: circulation in the area is allowed only during the exhibition period and, obviously, upon the payment of an admission fee, resulting in non-inclusive use of these public sites for local people. As stated in the catalogue:

we may even wonder [...] whether it is possible that the Giardini - owned in their entirety by the Municipality – home to an extremely valuable heritage of modern architecture and themselves a compendium of equally conspicuous landscape and botanical value- could be used by Venice's citizens outside the times, rules and methods deriving from the 'exclusive' use that has gradually been established (Mancuso, Menichelli, Zan, 2023).

A jury comprising Austrian and international architecture and design specialists and the State Secretary unanimously selected the AKT project from a shortlist of three projects. The 'Beteiligung/Partecipation' proposal was chosen for its quality and connection with the value of inclusion. As stated by the Ministry:

It was a unanimous decision. The innovative and participatory concept, the high quality of the project proposal, the theoretical and creative approaches as well as the specific plans for its realisation, has indeed convinced us. AKT and Hermann Czech pose relevant questions about the future – in their project they work in and with the city, they act in an inclusive way, and give thought to sustainability (Federal Ministry Republic of Austria Arts Culture Service and Sport, 2022).

After the project was internally defined, it was proposed to the Biennale and the Superintendence, a national-level agency that must approve any intervention on heritage or landscape, kicking off a negotiation process that we describe in the following paragraph.

The negotiation

This section describes the negotiation process undertaken by the Austrian Pavilion's curators to get their project approved by the Biennale. What follows reports mainly on the Austrian Pavilion's perspective on the negotiation project. We are aware that it represents a partial representation of facts.

As reported by AKT members, in July 2022, the local contact architect of AKT, Troels Bruun, presented the project 'Beteiligung/Participation' to the Biennale and the Superintendence during an informal meeting. At the end of the session, the Biennale advised the Austrian Pavilion to abandon the project as planned, anticipating the impossibility of granting permission to proceed (AKT, 2022).

Also, on that occasion, the Biennale suggested some alternative solutions to include local people, such as buying tickets to the Biennale for them or providing free access to other spaces throughout the city that the Austrian Pavilion should have rented (AKT and Hermann Czech, 2023, p. 157). The Pavilion's curators disagreed with the suggestions and decided to proceed with the original idea.

Two months later, in September 2022, AKT and Hermann Czech personally presented the project to the Biennale and the Superintendence in the context of an informal consultation. After the presentation, the institutions re-stated the unfeasibility of the project. According to the Superintendence, the project was unacceptable because while the inner part of any pavilion belongs to the country, the areas between the pavilions and the boundary walls belong to the Municipality, which gave them in concession to the Biennale. The walkway allowing the entrance of people from the gate in the wall would have stood on public land. Also, in the Biennale's view,

the Pavilion, as an exhibition building, cannot be used for other initiatives, such as activities of the population of Sant'Elena. This was seen as highly controversial by the Austrian Pavillon representatives, as 'it is the traditional task of the Biennale to question conventional views of art. If this is not recognized, the Biennale would determine what is art and what is not art' (AKT, 2022).

After this consultation, AKT and Hermann Czech reviewed the project based on the Biennale and the Superintendence feedback. In the new project, they proposed building a temporary bridge made of scaffolding that would have climbed over the wall, thus connecting the Sant'Elena district to the Pavillon without occupying public land and, most importantly, without creating a gate in the wall. The curators submitted the revised project to the Biennale and the Superintendence in January 2023.

In March 2023, two months before the Biennale's opening, the Superintendence, the Biennale and the Municipality officially jointly refused the project, stating that:

the proposed structure will be on public ground and the administration cannot create the precedence of an entrance that is not part of the Biennale's area for security reasons [...] the proposal of a single pavilion to relate or connect up to community space is against the intended use and protection of the cultural asset in its unit [...] The division constitutes a modification that contradicts the conservation of the asset as a whole (AKT, 2023).

According to AKT, to justify its decision, the Biennale mobilized existing regulation:

[...] brings to mind the binding decree of 19.09.98 for the whole Giardini della Biennale complex, by which the Giardini della Biennale were declared as being of art historical interest in their entirety [...] the proposal of a single pavilion to relate or connect up to community is against the intended use and protection of the cultural assets in its unity (AKT, 2023).

From AKT's point of view, instead, this space cannot be defined as public, as the Biennale makes exclusive use of it:

For the period of the Biennale, the communal ground of the Giardini is only accessible to the public with a ticket, and they are closed to the public for the rest of the year. The part of the Austrian Pavilion entered from the new opening would be accessible to the public without a ticket and therefore would actually become the only truly public space. (AKT, 2022).

Outcome

AKT and Hermann Czech were notified about the official rejection on the 6th of April, only six weeks before the official opening of the Biennale. Therefore, they decided to re-organise the exhibition theme around the (failed) proposal. As stated by the architects:

This failure becomes the political content of the exhibition. The architectural intervention for the project will be carried out, except for the connection and will become the central exhibit of the exhibition as an inaccessible empty space (Austrian Pavilion, 2023).

In the revised project, on display until November 2023, the Pavilion was still divided into two parts. In the area that would have welcomed visitors from the Biennale, documentation about the original proposal, the negotiation process and rejection's motivations, and documents on the expansionary practices of the Biennale and the depopulation process in Venice, were displayed. The second half of the Pavilion showcased the, by now useless, materials for collective events, such as chairs and bleachers, that, according to the original project, would have been

used for the activities organised by local people: 'this part was to be handed over to the population of the neighboring district, as well as to urban right to the city initiatives of Venice as an assembly space' (press conference, May 2023). The temporary bridge that would have connected the Sant'Elena district with the Pavilion is now displayed in the external space of the Pavilion. According to the organisers, the Pavilion visually represents the exclusionary policy put in place by the Biennale. As stated during the May press conference:

what we show is a building freeze, the sudden interruption of a process, the void of the empty space, and thus the missed chance by the Biennale to interact with the residents of the city that has been its host since almost 130 years becomes an exhibit (press conference, May 2023).

In addition to the contents provided in the exhibition, the Austrian Pavilion developed a publication comprising almost 400 pages, which documents the results of eighteen months of research conducted by AKT & Hermann Czech in collaboration with local researchers, grassroots associations and residents, which we quoted extensively in this case report. The publication comprises articles on the project, detailing the reasons which triggered it, with a special focus on the spatial problematics of the city of Venice, conflictual spatial policies and exclusionary practices, also providing suggestions for more inclusive and equitable use of public spaces, such as the Giardini and Arsenale, which host the Biennale exhibition (AKT and Hermann Czech, 2023 pp. 267-293).

Also, the Austrian Pavilion's curators in collaboration with grass-root associations, local people and researchers, developed a program of public events originally conceived for the half of the Pavilion destined for Venetian people's activities, and now to be held in the nearby Sant'Elena district and throughout the city. The public program includes concerts, books presentations, discussions, and exhibitions organised by local citizens and associations, such as the 'Chiostro a Sant'Elena' one, based in the near Sant'Elena neighbourhood; workshops involving international experts, such as the one on 'the transformation of European Historical Shipyards and Arsenals' organised by Unibo and Oxford Universities; and other awareness-raising initiatives on the situation of the city and the role of institutions organised in collaboration with local grass-root associations such as 'Biennale Urbana', 'Forum Futuro Arsenale', 'OCIO' and 'We Are Here Venice'. These initiatives aim to raise awareness of spatial exclusionary practices put in place by the Biennale and other institutions in Venice and provide inclusive opportunities to give a voice to Venetian people: 'Under the Motto "Partecipazione" AKT and Hermann Czech placed the focus on the involvement and participation of the people living in the immediate vicinity of the Austrian Pavilion here' (press conference, May 2023).

Thus, given the rejection of the project, the expected impact would be to raise awareness of the exclusionary use of space undertaken by Biennale, making visible a missed opportunity for social participation:

Instead of a bustling laboratory, the pavilion's half originally intended for the public is now a visible vacancy, a permanent construction site underscoring the central question of the project as to what role the Biennale could possibly play in the city / this rejection should then be made visible and tangible in the exhibition (DesignBoom, 2023).

The analysis of the press articles on the initiative, at this stage, seems to confirm the impact in terms of raising awareness, as the following quotes from various newspaper articles show:

The incomplete bridge and empty courtyard now speak volumes about the role of the Biennale in the local community (Huges, 2023)

With an operation that was only half successful but has not lost its political force in denouncing incessant territorial expansionism to the detriment of Venetians, the architecture collective AKT and Viennese architect Hermann Czech have turned the Austrian Pavilion into a manifesto of social struggle. (Domus, 2023)

The 'Actually' became a theoretical, apparently unrealizable thought construct that failed due to the stubbornness of the authorities and the fear and egomania of the Biennale management. (Czaja, 2023)

After a year of negotiations involving the Biennale and the Superintendence, the question still remains open. But at least it has been posed, it is on the table. And it is perhaps this 'provocation' by the Austrian architects has opened a new avenue for reflection, which must mature in a context where one wants to talk about the Future, in social terms (Pini, 2023).

This was also emphasized by the Austrian press: magazine *Weiner Zeitung* stated that:

the bridge now stands half-finished in the inner courtyard of the Austrian pavilion, making it a loud criticism of how the Biennale treats the city in which it has been taking place for almost 130 years (Klein, 2023).

Discussion

Regarding RQ1

Overall, we see differences in the interpretation of the key values addressed in this WP and tensions between them (RQ1). The values of inclusion and equality are intended oppositely by the actors involved.

For the Austrian Pavilion, inclusion closely relates to developing opportunities to directly involve local citizens in one of Venice's most relevant cultural events. In the original project, inclusion was pursued in different ways, including the direct involvement of citizens in the design of the Pavilion's project, the opportunity for them to visit it without paying a ticket, and the allocation of part of the Pavilion to their activities. This conception of inclusion is triggered by its opposite – i.e. exclusion. In the view of the Pavilion's curators, the Biennale's practices towards Venice and its inhabitants are characterised by exclusion. This is closely connected to the value of equality, which the Pavilion's curators intend as the opportunity to freely benefit of part of the city, which, in their view, is becoming increasingly less welcoming for local citizens.

The Biennale showed a different understanding of inclusion. Quite ironically, for the Biennale, the project proposed by the Austrian Pavilion lacked inclusivity because it would have privatised the public land owned by the Municipality, negatively affecting the Biennale's visitors and other Pavilions. Also, the value of equality is intended differently by the Biennale: while for the Austrian Pavilion's curators being equitable means providing free access, for the Biennale equality means providing the same access conditions to the exhibition's visitors. More than an issue of values (and 'privatisation'), this connects to the Biennale business model. For the institution, everyone must pay a ticket to access the exhibition (they also suggested to the Pavilion's curators to buy tickets for citizens or to rent spaces for their activities as alternatives to their proposal). Thus, an apparent tension between inclusion and equality emerges as the Biennale pricing policy, which requires paying a € 25 ticket to visit the exhibition, can be exclusionary for visitors and citizens of the city.

Regarding RQ2

Differences can also be observed in the existing evaluation systems (RQ2). Different versions of the AKT project were assessed in distinct moments by different actors: the jury at the beginning, the Biennale and the Superintendence during the negotiation process, the audience and the press once the exhibition opened.

In this respect, we can observe that the evaluation systems adopted by the actors are based on opposite perspectives. On the one hand, the evaluation system of the jury and the press is outward-looking: they look at the impact of the Pavillion's message on society, including citizens and the role of art institutions.

On the other side, the evaluation system adopted by the Biennale is inward-looking: the project's impact is mainly seen in terms of the (negative) consequences for its business model and framed in legal/bureaucratic terms.

The interplay between the two evaluation systems changed the project's focus and, eventually, shaped the Pavilion's outcome. In fact, from an inclusive space designed to foster the involvement of citizens, the Pavilion became an attempt to raise awareness of the Biennale exclusionary practice. The Pavilion visualises the different interpretations of values by displaying the evaluation devices adopted by the actors involved.

3. Portugal

3.1. Case 5: PELE

Presentation

PELE is a cultural association using art as a toolkit for participation, empowerment and social inclusion. PELE was created in 2007 and has worked systematically since then in a parish of Porto (Azevedo) in a vulnerable territory. Their work has extended beyond this territory, and they have developed projects in other cities of the country in collaboration with different partners. They work mainly in performing arts and understand artistic creation as a means of reflection, action and civic and political participation.

This association's work spreads on multiple fronts: a) artistic creation work; b) programming; c) NTO_Porto – Porto Theatre of the Oppressed; d) education/training (workshops); e) research – time and space to critically think about their practice. Their work has been developed in close partnership with other associations, cultural agents, and different institutions (e.g., prisons, schools). Their work targets different cultural facilitators, local communities, seniors, young students and vulnerable populations. PELE is a structure co-financed by the Portuguese Republic - Culture / Directorate-General for Arts., and some projects have European support.

We can underline some projects in progress:

- Satellite: a program of artistic residencies that proposes the connection between creation and programming, communities, and public space. It aims at establishing an area of cultural display, self-representation, and communitarian participation;
- #Mobile Cultural Center: this project suggests a transgressive bordering and potentially stimulating practice of access to cultural participation (for example, through artistic practice in spaces such as public transport). Inspires mobility routines by occupying the space of interdependence between artistic creation and programming. The Study Group, is an action-reflection collective that develops artistic creation proposals anchored in the local context, with the purpose of being presented on the 400 bus, which connects the city center of Porto to Azevedo. During 2021, four proposals were activated, proposing poetic disruptions in the daily lives of users of this line: Performance #1 Six moss spheres were transported along the Aliados - Azevedo route. The proposal was to roam with this hybrid Being, transporting Azevedo's autochthonous elements across different geographies; Performance #2 In this performance, the attention of the passengers was asked to, delicately, offer them a gift. Inside the small envelopes were seeds and a poem; Performance #3 Delivery of poetic messages to passengers. Each sentence written by the performers on a previously prepared paper, with a lichen drawing on one side, emerged as a possibility of love or conflict; Performance #4 Each performer inhabited a bus stop in Azevedo, in order to occupy and intervene in the space, with a view to rooting and (re)signifying the act of waiting.
- Azevedo: a regenerative artistic creation program that proposes to establish a dialogue between the territory of Azevedo (Campanhã, Porto), resident communities (human and more-than-human) and national and international creators;

Image 1. Artistic Residency for ethnographic mapping, where drawing was assumed as a mediating and exchange instrument between the residents of Azevedo and the artistic team of the project



Source: PELE's website

Image 2. PELE led an expedition with children to collect food in the city's Oriental Park and then cook it in the Kitchen, a structure set up by the association



- *Urgent Youth: Here and Now!*, which aims to strengthen democratic culture, through the creation of spaces that bring young people closer to civic and political participation and that allows them to become agents of change in their territories. Young students from schools in the municipalities of Maia and Valongo (near Porto) are invited to take part in artistic workshops, reflection meetings, mobilisation actions, public interventions, debate sessions and political agenda-setting with decision-makers and the rest of the community. The project is based on artistic expression as an instrument of civic and political manifestation for young people. The work process is organised around themes such as: youth participation, democracy, partisanship, associativism, web activism, activism, human rights and other 'urgent topics' suggested by young people.

Images 3 and 4. Activities with young people as part of the Urgent Youth project: Here and Now!



Source: Facebook page of PELE

- Re.sto.re: this project aims to promote cooperation and exchange of good practices at the European level and take advantage of EU transparency and recognition tools to increase training and employability opportunities for professionals working in the Social and Community Theatre field. Recognises the Social Theatre Operator as a professional to address the Risk of Social Exclusion;
- Cicatriz - Memories of Today is an online digital archive powered by videos of people from different contexts, in which they reflect and share their life experiences in a specific moment in time. The idea is to create an archive of present-day experiences. Each video is inspired by one of the words: democracy, freedom, neighbourhood, future, family, environment, fear, loneliness;
- Enxoval: considered a social representation of the female condition and a symbolic endeavour that crosses different generations, *Enxoval* was the name chosen for the umbrella project dedicated to women. In the scope of that project, *ARCA's - action groups, reflection, and artistic* were founded to discuss, reflect and create based on the feminine heritage, and also the project *The Bravas – women stories that inspire us*, whose aim is to gather reports of real-life women who contributed to the historical, political, and civil portuguese achievements and to inscribe them in our collective memory (all the stories are creating a narrative web, and some are illustrated in fanzine format);

Images 5 and 6. Activities with women as part of the Enxoval project



Source: Facebook page of PELE

- Cartography of desires - This project aims to claim the right to freedom of desire, to question and counteract standardised and dominant models of production of subjectivity, as an urgent way to construct, reconstruct and deconstruct reality. It proposes a space and time for reflection about individual and collective desires, understanding them as activation and inspiration for civic and political action.
- Art and Citizenship Laboratory (LAC): a space for artistic creation and civic participation for young people serving educational protection measures and in prison. It is aimed primarily at young people with school failure and dropout profiles, promoting the activation of social and personal skills for their social (re)integration and employability. The main goal is to certify young people through participation in artistic workshops (theater, music, fine arts) and through attending different thematic seminars. In one of these projects, PELE worked with 16 other individuals inside a prison facility over a year. There, they carried white papers, markers and paints, clay, music, and other materials

that could propose other forms of dialogue, expression, decision and imagination. It became a place where these men could reject the severity of their routine and create a place of regeneration - political, civic, individual and collective.

Images 7 and 8. Visual arts exhibition under the LAC project



Source: PELE's website

Since 2017, this association has been based at The House of Arts of Bonfim under the Parish Council of Bonfim protocol. PELE now has a home called Adega, a space dedicated to creating synergies between residents and invited artists. According to them, it aims to inspire alternative models of collective experience that will integrate tension, conflict, sharing and utopia. A place open to experimentation that contributes to affirming a common identity. They have also created an informal network called #Expanded Parliament, a space of collective creation that mingles different languages and communities. It is assumed as a regenerative ecosystem of participation, discussion, conviviality, and action. It proposes to reflect on alternative production, networking, and training models.

Image 9. Adega, the association's co-created house. Azevedo, Porto



Source: Facebook page of PELE

Methodology

The analysis has been conducted by adopting a qualitative approach. The fieldwork took place between February and July, and the first step was to hold an informal conversation with two members of the association to present the goals of the ongoing project and understand the expectations of both parties about it. From that moment on, our work was organised into the following tasks: analysing documents on the association's mission and website; monitoring the association's presence on social media; analysing evaluation reports already produced; interviewing key figures in the association; holding a focus group with key figures in the association and two elements of a partner association. These tasks were carried out to get to know the association's work (history, ongoing projects, goals and targets of their action), to understand what values they integrate into their action (from an internal and external perspective) and to analyse which and how they implement evaluation systems to assess the impact of their work. In the specific case of the focus group, the main focus was to understand how this association views the impact of its action, the desired results and the potential unintended consequences. During this focus group, in the logic of co-creation, we also laid the foundations for designing a monitoring and evaluation tool that the association can add to the evaluation methodology it already has in place.

Findings

Connection with values of diversity, equality, and inclusion (RQ1)

The association defines the following as the guiding values of its work: participation; empowerment; social inclusion; gender equality; democratisation; accessibility; collective creation; identity and memory; ethics and aesthetics; transdisciplinarity; site-specific; other centralities; invisible voices; art in public space; create new links; strengthening the communities; bringing together participants, institutions, territories and audiences; action-thought-research-documentation.

The work of this association has been guided by the values outlined above since its foundation. Although specific dimensions may be introduced depending on the project, the matrix of values around which PELE intervenes in the territory and with the populations is clearly defined.

Regarding inclusion, we focused on analysing who the target audiences are and how they are involved in the projects developed by the association; regarding diversity, we focused on the dimensions/themes addressed in these projects; regarding equality, we focused on better understanding how the association acts as an essential means of artistic access.

The values of culture, especially diversity, equality and inclusion, are explicitly highlighted in the daily action of this association: the ongoing projects we pointed out above mirror this. We can find the implementation of these values on different fronts of PELE's work. Regarding inclusion, projects are carried out within the community's territory; they are conceived and carried out in co-participation and co-creation with the populations of the territories and are closely linked to the territorial contexts (past, present and future) in which they are conceived. In addition, the association's projects include children, young people, adults and older people. Also, the association's home – called Adegá – is a space that intends to materialise the value of inclusion: a house co-constructed by the populations, where community building and integration can happen. As we can see, inclusion is pursued in different ways, including the direct involvement

of populations during project implementation and the opportunity for them to co-create the association's home. This conception of inclusion is closely connected to the value of equality.

Regarding equality, the association develops artistic work (especially theatre) close to the people in the community, serving as an essential means of access, especially for those who do not have the habit or easy access to this type of artistic fruition. The association's work is often developed in vulnerable territories, one of the goals being to secure access to artistic expression for these populations.

Regarding diversity, we can see that awareness of issues such as gender equality, empowerment, accessibility, and invisible voices are critical in their work. The projects have a politicised bias, with intentions beyond the pure aesthetic dimension, proposing critical thinking and social changes.

There is an apparent coherence between the values they identify as fundamental in their action and the values discussed in this WP.

However, according to Serafino (2022), since PELE proposes a 'social art' where spontaneity and values such as inclusion and diversity are privileged, it may face challenges in being recognized by some more canonized segments of the artistic field, more focused on purely artistic and aesthetic issues. The value system of PELE – in particular, the dimension of co-creation with project participants and their empowerment – may also encounter tensions mainly due to the diversity of values informing the partners' agenda, less aware of these values and issues. On the other hand, PELE has built a network of partners over the past few years that are aligned with its value system and action priorities.

Image 10. Rehearsal for the show 'I'm not like a fig tree', which featured elderly participants from the local community



Source: Facebook page of PELE

Image 11. 'Radical Tenderness' performance, created and performed by young women



Evaluation systems (RQ2)

Evaluation has been part of the association's practice since its beginning – in 2010, when they developed their first project in a prison context, they felt the need to systematically evaluate their work's impact. Since then, the association's projects have integrated evaluation processes, conducted either by external evaluation teams (associated with the funding entities) or through protocols established with research centres (mainly in the field of sociology or psychology). Thus, the association articulates different evaluation models: more and less formal; with recourse to external agents but also internally; as a result of the compulsory requirements of some funders

but also as a result of the understanding of evaluation as a fundamental part of the critical analysis of their action.

As mentioned above, evaluation has been a fundamental part of the work process of this association almost since its foundation. The importance of thinking about the work dynamics and the consequences (desired and unintended) of intervention in the territory and with particularly vulnerable populations has been embedded in PELE's work for many years. The evaluation process has always been understood as closely linked to a prior diagnosis; more than that, the diagnosis is already understood as part of the evaluation process, insofar as the impact of the work can only be evaluated afterwards, if the characteristics and dynamics of the context where intervention is intended have been systematised beforehand.

The impact evaluation processes most valued by the association were based on highly close approaches with the projects teams, participants and partners. In those cases, the techniques used to measure impacts were regular fieldwork during the projects, interviews with key actors (participants, mediators, partners, PELE members), observation, and surveys.

The association identifies some tension between the evaluation processes already in place. When the evaluation is requested from research centres, the result tends to be very academic/theoretical/conceptual; on the other hand, when the evaluation is requested from evaluation entities, they feel that the result shows a distance in relation to dimensions which they consider to be more sensitive, and the language of the evaluation itself is very distant from that used by PELE. So, they identify a need for greater crossover between different forms of evaluation – more formal and informal; more conceptual and more technical. Furthermore, budgetary and time constraints often limit the need for a proper diagnosis – something the association attaches great importance to and tries to do in all projects. The intermittency of the partner teams with whom evaluation processes are often conducted is also identified as a challenge.

Precisely because they identified the above challenges, they understood the importance of project monitoring/evaluation by a team member – someone who understood the project from the inside and could follow it from the first moment to the last. To address that, PELE is now, for the first time, trying a new evaluation system – in a project currently in progress (Azevedo), a member of the PELE team is developing the ongoing monitoring and evaluation of the project. The fact that the project was designed around four strands simultaneously – the revitalisation and co-construction of a physical space with the population; a mobile cultural centre, which develops actions in several places; the creation of connections inside and outside the territory and with other territorialities and the co-construction of a space for reflection and collective political decision – made the recruitment of an external evaluation team impracticable, given that it would not be able to follow a project so spread out in time and space, and to be developed so organically with the groups and in the work of PELE itself. The work produced by this PELE team member has been based on an ethnographic approach – observation of the activities, support to the programming and production of the activities, monitoring table of actions, visual record, conversations and feedback of these conversations to all those involved in the activities (participants, facilitators, artists), to establish the bridge with the artistic direction of the association, to build products (more and less conventional, like texts, poems, a padlet), to keep a systematic record of the process in a field diary.

The association hopes that this ongoing evaluation system will enable reflection on the work to be systemised throughout the process and the goals and instruments to be readapted in line

with this evaluation. Also, this evaluation system makes it possible to identify the micro-transformations in the groups and the territory during the implementation of the project. Eventually, they want to find an evaluation tool that will allow them to assess the transformative potential of their work during the implementation of the projects. The ultimate goal of this experience is to find an evaluation methodology that can be applied to other PELE projects.

3.2. Case 6: Sonoscopia

Presentation

Sonoscopia is a cultural association founded in 2011 that has worked in Porto ever since. Its mission has been to create a space where artists related to experimental, improvised and electroacoustic music can cross ideas and develop consistent work in a room that gathers technical and human conditions. One main goal of Sonoscopia's work has been to create a working space for local and national creators and, simultaneously, to favour their establishment in an international network of creators.

In its first version, the association occupied a space located in Stop Shopping Center (Bonfim, Porto), where numerous amateur and professional musicians from different musical areas worked. Nowadays, Sonoscopia is based in another area of the city (Carvalhido, Porto) in a new space with better conditions for performance and recording. The new space has a stage for performances, a studio, work and exhibitions areas, rooms for residences, a bar and a large garden.

This association's work spreads on multiple fronts: a) programming – a regular programme of concerts; b) creation – artistic creation work (concerts, exhibitions, sound installations, musical instruments) with other groups and associations (local, national and international ones); also, the members of the association are themselves creators; c) edition – edition and publication of discographic material; d) education and research – research work; publications; workshops (young students and children); e) residency programme – providing artists and scholars with the time, space and resources to work on researching and developing their practice. Sonoscopia is co-financed by the Portuguese Republic - Culture / Directorate-General for Arts, with other occasional funders in some projects. There is also a sonoscopia membership system, which allows people to give financial support to the association and benefit from some discounts on show tickets or workshops.

Image 1. 'Invisible Gestures' Performance, GP Drumming and Sonoscopia (Miquel Bernat, João Dias and Gustavo Costa)



Source: Facebook page of Sonoscopia

Image 2. Communal dinner between shows



We can underline some projects in progress:

- Microvolumes: a series of concerts in improvised, experimental and electroacoustic music that began in 2004. The elementary principle of Microvolumes is disseminating new forms of musical expression outside the commercial or institutional circuits. They favour emerging artists whose relationship with these spaces creates a fundamental artistic movement to solidify the cultural fabric. At the same time, they serve as a presentation space for the most renowned names in experimental music but with a solid connection to the ethics of strengthening experimental music scenes related to various parts of the world. In addition, the concerts are preceded by a dinner that provides a more welcoming atmosphere and develops the audience's proximity and deeper relationship with the musicians and the surrounding space;

Images 3 and 4: Microvolumes shows



Source: Sonoscopia's website

- No Noise: is a small-scale festival that takes place annually on the first Saturday of August since 2015, focused on experimental music and the Do It Yourself culture that defines a good part of Sonoscopia's identity and ethics. Two editions (2018 and 2019) that took place at Convento de Francos (a location with unique characteristics and a rare dimension and openness within the urban fabric) sought to recover an abandoned space in the city;

Image 5. Harga (Dali de St.Paul), No Noise #8



Image 6. Steve Hubback, No Noise #8



Source: Facebook page of Sonoscopia

- Grupo Operário do Ruído: is a collaborative music creation collective, created by Sonoscopia in 2020. It is a group open to the participation of all, where it uses unusual, dull, fun musical instruments and execution adapted to all participants. The proposal is

that through these unique instruments, developed and adapted by the group members, freedom is explored, where all sounds are equally important and can be transformed into music by anyone.

Sonoscopia's work targets different cultural facilitators, national and international musicians, researchers, young students and children. According to their mission statement, through their work, they intend to create a free space where people feel part of the space/association/collective /project of Sonoscopia.

The association is part of an international (informal) network of experimental improvised music. This network allows the circulation of artists in European and international tours: Sonoscopia welcomes some of these international artists, organises concerts when they visit Porto, and enable integration in this network of the 'Sonoscopia artists'.

Image 7. Performance by Grupo Operário do Ruído



Source: Facebook page of Sonoscopia

Image 8. Building their own musical instruments



Image 9. Workshop



Source: Facebook page of Sonoscopia

Image 10. Activity for children – “The secret ear of plants”



Methodology

The analysis has been conducted by adopting a qualitative approach. The fieldwork took place between February and July, and the first step was to hold an informal conversation with a member of the association to present the goals of the ongoing project and understand the expectations of both parties about it. From that moment on, our work was organised into the following tasks: visiting the association's premises and attending a cultural event there; analysing documents on the association's mission and website; monitoring the association's presence on social media; analysing the structure of the activity reports required annually by the association's funding entity (not an evaluation report); interviewing key figures in the association. These tasks were carried out to get to know the association's work (history, ongoing projects, goals and targets of their action), to understand what values they integrate into their action (from an internal and external perspective) and to analyse which and how they implement evaluation systems to assess the impact of their work. To the extent that it became clear early in the fieldwork that the association adopts an informal evaluation system, we oriented the interviews towards discussing how the association views the potential limits/benefits of prevailing such an evaluation system and its consequences (internal and external).

Findings

Connection with values of diversity, equality, and inclusion (RQ1)

According to them, the guiding values of their work are: collective work; no hierarchies; commitment to experimental improvised electro-acoustic music; formation of audiences in this area; encouraging reflection and critical thinking.

Regarding inclusion, we focused on analysing who the target audiences are and how they get involved in the projects developed by the association; regarding equality, we focused on better understanding how the association understands its role as an essential means of artistic access (what work options it privileges and what pricing policy it applies). We argue that diversity is less relevant in this context.

Regarding inclusion, their work understands inclusion as realising initiatives aimed at various audiences of different age groups, including children. This translates into the opportunity for diverse audiences to attend the initiatives – adults and children attend the concerts; the activities related to sound awareness are attended by everyone, including families; the workshops provide tools, for example, for young students. Inclusion as a value can also be identified in one of the most important dimensions of this association's work: the desire to build a kind of 'Sonoscopia community', that is, a space of belonging for everyone, from professional musicians to children who are discovering the potential of sound for the first time. Also, the non-hierarchical relationships within the association's team translate into an environment of great familiarity between them and the participants in the projects, workshops, and cultural events the association promotes.

Regarding equality, we can see that access to the work of this association, in particular, the concerts, is free of charge or involves a fee of no more than €10 (which includes a concert and a communal dinner). In this sense, access to culture is understood as a pillar of democracy, one that should be accessible to all, with economic ends not being a priority in defining the strategic lines of its work. Also, Sonoscopia develops its work in experimental, improvised and

electroacoustic music, an area that, at first, could be considered niche. However, the projects it creates aim precisely to democratise access to music and 'sound art', forming audiences in this area of music. They try to be a bridge between 'niche publics' and other publics, and between informal spaces and more central/institutionalized spaces in the city.

The concept of diversity is the most complex to specify, as it cuts across all dimensions of the association's work as a value to be preserved but not explicitly addressed.

There is an apparent coherence between the values they identify as fundamental in their action and the values discussed in this WP, particularly those of inclusion and equality.

Evaluation systems (RQ2)

The association has an informal evaluation system. Its primary funding entity does not require any evaluation report – the only document required is an activity report, with information about the teams, the spaces, the budget and the goals associated with each activity. Thus, the association and its projects have never been subject to an external evaluation, prevailing an internal, informal evaluation among Sonoscopia's team members.

The evaluation system consists of an informal evaluation within the team – a critical discussion of the work process (however, without a written record). In the case of activities that regularly involve other groups, the system is identical: the evaluation of the work carried out is done through an informal group discussion to identify practices to maintain/change, new directions that are more in line with the expectations of the various parties involved. The same logic of informality tends to be held in the relationship with the association's different partners.

The activity report required by its main funding entity is based on a fairly rigid structure and intends to systematise information according to closed categories: teams; spaces; support; structure; activities; activity plan; budget. In this report, the part closest to an evaluation appears when the association is asked to compare the initially proposed goals with the results. However, this reflection is only the result of internal discussion within the association and the informally carried out evaluation. In this part of the report, the items to be analysed are the following: artistic project developed (activities; context of presentation; artistic relevance and team); range and visibility obtained by the activities (addressees; initiatives to attract and sensitise audiences; actions with national and international programmers; promotional means; results of the dissemination strategy in local, regional, national, international or web contexts; press and specialised critical coverage); management project implemented (timing; human and material resources including facilities); goals achieved (artistic and professional; cultural interest); the importance of the project in local intervention.

The association organises a session at the end of each year – Disorganised Sound –, a conference open to the public, where some artists who have developed work with the association participate. It is a moment where the artists think about their work, and the association's team members also discuss theirs. The theme of this meeting is always related to the theme of the work developed by the association during that year. Although it is not an instrument for evaluating the impact of the work, it is the closest the association has to listening and discussing openly with the artists and the community the work developed during that year.

The association is distancing itself from the need to implement a more formal evaluation system – the logic of informality on which the evaluation process is based is in line with the values of

informality, horizontality and little bureaucratisation that underlie the whole association. They admit, however, that a systematic evaluation could allow a more distanced look at their action and the ability to identify which practices need to be changed. They identify three fields that they would like to see evaluated/studied by an external team - 1) the audiences: to know who goes to Sonoscopia's space, their socio-demographic profile, their relation with the space and with the association's work, and their motivations; to identify similarities/differences between the audiences that go to Sonoscopia's space and the audiences that watch the association's creations presented in other places of the city; 2) the workshops (to understand the impact they have on the individuals that participate in them); 3) the sustainability of the association and the projects developed.

4. The United Kingdom

4.1. Case 7: Gasworks

Presentation

Cultural institutions in the UK play a pivotal role in shaping societal values, fostering artistic expression, and involving diverse communities. The pursuit of Equality, Diversity, and Inclusion (EDI) is a central activity for many cultural institutions. EDI is also embedded in a variety of UK government policies. This case report delves into recent EDI initiatives in Gasworks, a small-size contemporary art organisation in London, United Kingdom (<https://www.gasworks.org.uk>).

Image 1. Gasworks' entrance in Lambeth, South London.



Source: Courtesy of Gasworks.

Gasworks was established in 1994. Situated in the borough of Lambeth in South London, this non-profit organisation has evolved from a local artist studio to an acclaimed centre for artistic exploration and cross-cultural dialogues, mainly with the Global South. It provides artists' studios, exhibits emerging artists, and runs two residency programmes for international and local artists. Gasworks' commitment to EDI is deeply rooted in its history and mission. The organisation's initiatives revolve around fostering collaborations with underrepresented artists, welcoming those from decolonised geographies and individuals identified with non-normative gender identities and sexuality. These activities provide platforms for marginalised voices alongside community engagement programs that resonate with diverse target audiences.

Gasworks is the 'hub' of the Triangle Network, a UK registered charity that has established links with 30 international arts organisations, largely located in South America, Africa, and Asia.

Gasworks and Triangle Network share a board of directors and financial accounts. Though the two organisations are clearly intertwined, this case study focuses on the distinct activities of Gasworks, rather than those of the Triangle Network. Gasworks is small, with 14 members of staff, 10 trustees, and a 'Participation Advisory Board' with 11 members.

Gasworks receives official funds from Arts Council England (ACE), and has received regular funding from ACE, under different schemes, since the turn of the millennium. It is currently a National Portfolio Organisation (NPO). In the UK, NPOs receive regular public funding, via ACE, for a fixed period of years and may reapply for NPO status in subsequent funding rounds. NPOs are required to send annual reports, create business plans, and conduct self-evaluation (ACE, 2023); specific reporting is required on aspects of equality, diversity, and inclusion. An important point to note about the UK funding context is that no cultural organisations are fully funded by government; all are reliant on fundraising and/or earned income, even when publicly funded. NPOs may be funded long-term, but funding is only secure for the fixed grant period. Gasworks is currently funded through Fiscal Year 2026.

The Triangle Arts Trust annual report for 2022-23 (Triangle Arts, 2023) gives an overview of Gasworks' scale: Overall income was £857,270 (down 3% from the previous year). Of this total, the ACE Grant-in-Aid was about £290,000 (ACE, 2023b), about one-third the annual budget. Gasworks welcomed 6,872 visitors (up 10%), with an extensive participation programme to engage local community groups, notably local Latin American migrants. In FY2023, Gasworks supported 24 artists (through exhibitions, online public programmes, residencies, and participation programmes) and provided nine subsidised studios for emerging and mid-career artists. It also commissioned four new bodies of work.

Methodology

The analysis is based on qualitative methods. During June and July 2023, we conducted interviews with members of Gasworks' staff and advisory board:

- Alessio Antonioli, (outgoing) Director
- Laura Hensser, Managing Director
- Rosa Tyhurst, Curator
- Javiera Sandoval Limari, Coordinator of the Participation Programme and Member of Gasworks' Advisory Board

Interviews covered content and programming, in general, and activities and initiatives related to EDI and the composition of the organisational team. We also asked how the organisation judged its successes (or failures) and their perception of UK cultural policy, especially around EDI support.

Interviews were supplemented with fieldwork, which involved attending several of Gasworks' public events in summer 2023, including an Open Studios in June 2023, in which the four international residency artists showcased their work for the public. For this event, we conducted a short 'vox pop' exit survey to assess audience response to the initiative to gather feedback from participants. We took fieldnotes on other events as well, such as a community breakfast for the ongoing exhibition, Future Tropics, the first UK solo exhibition by Amsterdam-based

Singaporean artist Kent Chan. In addition, we collected Gasworks public documentation, including budgets, programmes, strategic documents for further context.

Image 2. Film still from Kent Chan's exhibition Future Tropics (25 May – 10 September 2023).



Source: Courtesy of the artist.

Findings

Values of Diversity, Equality, and Inclusion

Gasworks' vision, which was present at its inception, was to foster collaboration with the Global South to incorporate postcolonial perspectives in contemporary arts. A primary objective is to provide emerging artists with opportunities to create new work within contexts that encourage dialogue and the exchange of ideas. This shows a long-standing centrality of EDI values in the organisation.

As mentioned above, EDI values have gained prominence in the broader cultural and political sphere in the United Kingdom (as elsewhere). Gasworks takes pride in having championed these principles for the past three decades. Tyhurst (curator) states:

Gasworks have always been thinking about inclusion, diversity, equality. I make this joke that Gasworks was diverse before you had to be diverse. Now people are catching up. I imagine we're an organisation that lots of people look to as best practice.

Antoniolli (director) made a similar point:

I hope it doesn't sound big-headed to say that Gasworks, and other organisations of course, feel like this [EDI] is something that we've been doing for 30 years! [...] It's wonderful to see that now, many art organisations are looking in that way too.

Antoniolli expresses the organisation's commitment to EDI, while emphasising the need to avoid complacency and constantly challenge existing formulas to address the evolving needs of artists and audiences.

Gasworks implements EDI values at various levels in the organisation. In addition to various artistic initiatives (see below), it has developed a code of conduct that governs how individuals

within the organisation treat each other, listen to one another, and navigate vulnerabilities, particularly for artists who are visiting the UK for the first time. It addresses anti-racism, harassment, and respectful treatment. Additionally, Gasworks introduced specific organisational principles that guide staff and collaborators, which includes prioritising diversity and equality in all aspects of work, being mindful of environmental impact, and striking a balance between ambition and workload. The code and organisational principles are updated annually and are available publicly on Gasworks' website.

Arts Council England requires a commitment to equality, diversity, and inclusion. Gasworks acknowledges the importance of such policies in addressing underrepresentation and discrimination. Given their orienting philosophy, Gasworks does not believe that EDI values constrain action; indeed, they welcome the normalisation of EDI in cultural policy:

The policies and the commitment are amazing. It's super important to address underrepresentation, racism, phobias, whether it is homophobia, misogyny, antisemitism. [...] Certainly, as a publicly funded organisation, to have the Arts Council or government saying these are the things that are important to keep focus on [is useful]. (Antoniolli)

However, some tensions emerge around the required bureaucratic reporting processes:

When you are working on public money, what you are doing has to be bigger than you. To have that guidance it is important, and I absolutely welcome it. But sometimes the implementation and, then the way in which statistics are being collected, starts to unravel a bit. It becomes clanky. Sometimes you end up reducing people to their skin colour, rather than the quality of their work. Or you make sure that you work with somebody from protected characteristics and that becomes more important than the quality of their work. Our job is to be able to find the middle ground of all these things, the point of contact. (Antoniolli)

This points to how EDI values are instantiated and how they are evaluated (discussed below).

Within this context, Gasworks perceives its role in the contemporary arts sector is to challenge the definition of EDI values: 'We don't want to be [just] part of the conversation but [we want] also to lead it', states Antoniolli. In supporting art and audiences in their journeys, Gasworks endeavours to maintain a fixed space that continuously evolves, ensuring its continued relevance in the ever-changing landscape of contemporary art. This supports Gasworks' orienting philosophy: to support emerging artists in their professional development, create a safe space for meaningful conversations, and challenge the notion that contemporary art is driven solely by Western practices. Antoniolli says, 'By involving centres perceived as peripheral, Gasworks wants to provide an alternative, richer, more complex voice into the contemporary arts.'

In this way, for Gasworks, EDI values are centred on amplifying diverse voices from around the world.

Here, we briefly describe two initiatives—The International Residencies Programme and the Participation Programme—to give a sense of how specific EDI values are actually implemented.

International Residencies Programme: A Transnational Sense of Community

Gasworks' Residencies Programme plays a significant role in supporting the development of emerging international artists by offering studios and accommodation for three months. This setup encourages the exchange of ideas with other artists and staff, often instigating experimentation with new concepts and materials. For Antoniolli, the international residencies

make Gasworks different from galleries that work via commissions as they seek to provide space and support for artists from deprived landscapes, both cultural and political:

They might be underrepresented artists because of racism, homophobia, misogyny; artists that might struggle to find other institutions to show in. So, we are particularly looking at these people that categorise themselves within a characteristic that feels that they haven't really had an opportunity. (Antoniolli)

The mission, therefore, is to provide a safe space for artists who 'feel that this isn't a given'. Tyhurst (curator) highlights the common accommodation provided to resident artists. In 2021, Triangle purchased *Petitgasworks*, a 5-bedroom house, 20 minutes' walk from Gasworks' headquarters. Tyhurst says:

The artists share a life inside the studios [...] they're all together in the same house. They all come to London at the same time, something that other residencies don't offer, they get to know us and also to get to know each other. The house really facilitates that.

The common location facilitates a sense of community while providing financial security and fosters strong relationships, enhancing the overall residency experience. Hensser (co-director) says 'We own our building. We're not going anywhere. We're an organisation that's here to support emerging artists for the next 50, 100 years.'

The security involved in owning capital assets to support the organisational objectives is worth pointing out, as this can reduce value tensions within an organisation, allowing it to focus more clearly on desired values.

Image 3. Cheong See Min, Blanca Gracia, Agrade Camíz and Clara Esborraz, artists of the International Residencies Programme [March-June 2023].



Source: Courtesy of Gasworks.

Participation Programme: An Alternative Model for Community Engagement

Gasworks is in the hyper-diverse borough of Lambeth, 'a pocket of being abroad within the city of London', in Antonioli's words. As he says, 'Our location gives us a role.' Through an array of interactive, exploratory, and/or experimental activities led by a local artist (selected through an open call), the Participation Programme strives to produce a vibrant and inclusive space for artistic collaboration and community integration. By placing local artists at the forefront of the programme, Gasworks fosters a participatory environment that empowers individuals to engage meaningfully with an expanded and sometimes non-normative conception of contemporary art. In this way, Gasworks' Participation Programme challenges traditional ideas of inclusion and proposes an alternative model for engagement with the local community.

In 2018, the first commissioned artist, Jacob V. Joyce, worked with a group called Out and Proud African LGBTIQ+ (OPAL), whose members sought asylum in the UK due to their sexuality. As Hennser (co-director) explains 'To seek asylum on a sexual basis, in the UK as a member of the LGBTQ individuals must be actively out. They must prove that they are a member of the LGBTQ community.'

Joyce, an illustrator, designed a series of workshops, focusing on poetry-making and collage, that provided safe spaces for self-expression and exploration. The initiative supported people who often spent their days confined to their homes or dealing with the stress of asylum applications. The initiative resulted in the creation of a book of poetry. Remarkably, these workshops played a vital role in helping some individuals secure asylum in the UK, as the poetry book was used as evidence in their court cases for asylum to provide tangible proof of their connection to the LGBTIQ+ community.

Image 4. Artist Jacob V. Joyce's workshop with queer collective Out and Proud African LGBTI+ (OPAL) during the first residency of the Participatory Programme at Gasworks [November 2018 and July 2019].



#SLFTT

Black Queer World Building | I Am Queer
Photographer: Brandon Kalyan
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Photo: Brandon Kalyan.

That initiative's success set the tone for subsequent activities. Other examples of Gasworks' Participation Programme include InnerSwell, which collaborated with migrant and refugee communities in Lambeth to build a musical installation for the nearby Triangle Adventure Playground, one of the oldest playgrounds in England. And Bryan Giuseppi Rodriguez Cambana, an artist and second-generation migrant, who organised a series of free English classes for Latin American participants, creating a collaborative and caring learning space at Gasworks. The English classes emphasised process over a tangible final product, as the focus was on learning English, though contemporary artworks were brought into conversations and storytelling. The classes, in Hennser's words, 'became a way to bring people together, create positive experiences, and impact participants' lives, potentially inspiring further engagement with art organisations.'

Image 5. Participants of the free English classes during Bryan Giuseppi Rodriguez Cambana's Participatory Residency at Gasworks (1 July 2022 – 28 February 2023).



Source: Courtesy of Gasworks.

The Participatory Programme shows how art and artists can play a transformative role in fostering connections and personal growth within communities. Sandoval Limari (Participatory Board coordinator) says:

The idea of inviting people that are not connected to the contemporary arts that take place in the gallery—I don't want to say that these people are not connected to arts, because they are connected in different ways—but the idea is inviting them and really caring for one another. It's about opening Gasworks to different people and experiences.

Gasworks has no specific preference for a particular background; however, candidate artists are expected to have some level of knowledge or lived experience related to the communities they engage with, including an understanding of migration or displacement experiences. Apart from being collaborative, the nature of potential work is open. Though there have been some challenges in maintaining continuity with participant groups over time, Gasworks have secured funding for three more years of the programme. It is committed to continuing its engagement

with diverse communities and organisations, including the Latin American Youth Forum, AMPLA (Association of Latin American Parents), and OPAL.

Evaluation Systems

Our results show that Gasworks has a complex range of evaluation systems, which combines formal and informal, internal and external, and ex-ante and ex-post forms of evaluation. These systems can be divided into three categories: externally driven (official) evaluation, internal evaluation, and 'co-created' evaluation, which we discuss in turn.

Externally Driven (Official) Evaluation

In the UK, publicly funded organisations must demonstrate effective use 'taxpayers' money' through prescribed evaluation processes. Importantly, such evaluation is required by the external funder, often with specified parameters; however, the evaluation is conducted by the funded organisation. National Portfolio Organisations (NPOs) like Gasworks are expected to set their own performance targets and to evaluate their progress. Quarterly reports involve detailed spreadsheets and activity tracking. NPOs are also obliged to report on EDI measures to Arts Council England by providing data on the representation of diverse groups across various areas, including programming/cultural offer, artists/creators, audiences, employment, and the development of inclusive workplace cultures. The formalisation of EDI values within UK cultural policy is welcome but creates tensions. On the one hand, Arts Council funding is 'a life saver' for Gasworks. As Antonioli puts it: 'All the private funding wants to fund projects, but nobody wants to pay your electricity bill, nobody wants to pay your salary. To have a public institution that does that is enormously important and I couldn't be more grateful as an institution.'

As an NPO, Gasworks can commission artists without (for the most part) worrying about commercial success and support talent development. Nevertheless, Gasworks experiences challenges related to bureaucracy and the increasing pressure to do more with less funding.

Gasworks and Triangle Network have scored 'outstanding' on all key ACE priorities; nevertheless, as with all NPOs, they are obligated to provide financial and summary accounts annually along with the quarterly reports on their activities to the Arts Council. Further, the reapplication process in May 2022, which secured continued funding for 2023–2026, required Gasworks to report a significant amount of evaluation data.

Overall, Gasworks finds the most challenge in the 'one size fits all' aspects of the official processes. Hensser (co-director) points to the constraining nature of specified formats:

They [ACE] said everyone has to fill out the same spreadsheet, and it just doesn't work. We used to report through board papers, we used to report verbally [...] You can't get everything from a spreadsheet. You can't possibly understand the work that we do on our participation programme in a box that only allows 50 characters. That is missing. You worry that you just become a statistic, you just become a tick box.

Further, measurements may not align with the organisation's mission and nature of work. For instance, measuring success solely based on the number of visitors is not perceived as appropriate for a small space like Gasworks, where the goal is to support emerging artists rather than attract massive crowds:

Success is measured on how many people come to visit Gasworks. If you're doing a Picasso exhibition, you're going to have queues around the building, but if you're showing Kent Chang [the Singaporean artist currently exhibited at Gasworks, whom] nobody's heard of [...] because he's an emerging artist, so you are not going to have queues around the building. If you are Tate, of course, people come to London and you're part of a very touristy thing. Nobody waits for Gasworks to open. So, this statistical information starts to wobble when you're an organisation that does things in a different way. (Antoniolli)

Antoniolli argues for a longer-term evaluation:

You have to measure success not on how many people come to the gallery but maybe on what is the career trajectory of that artist and how Gasworks important in their development. The measuring can't happen at the end of the exhibition, but maybe in five years from now.

Reporting forms also use generic metrics to apply across different artistic disciplines—such as visual arts, theatre, poetry, and opera—and are often rigid, as with attendance measures. This can lead to an understanding gap between funding bodies and the organisations they support. As Anoniolli says, 'Everybody gets penalised in this sort of common-denominator type formula.'

To better support Gasworks' goals, Hensser suggested that ACE adopt a more personalised and flexible approach to reporting, allowing organisations to showcase the depth and impact of their work beyond rigid spreadsheets. Similarly, Anoniolli refers to an advocacy group, Common Practice (Gasworks is a member) that published *Size Matters* (Thelwall, 2014). This publication addresses the issue of measuring success and value for smaller organisations, which may have small audience numbers but nevertheless play a crucial role in supporting emerging talent. Gasworks' director suggests that the Arts Council needs to recognise the diversity among creative industries and adjust their approach to evaluation relative to the different aims and scales of each organisation.

The externally driven evaluation creates tensions. Reporting, especially on a quarterly basis, is time-consuming and has increased the workload for Gasworks' staff and its board of trustees, taking time away from labour spent on arts-related activities. Funding is limited both in amount and timeframe, and not inflation protected, creating familiar challenges of delivering exceptional artistic experiences while coping with financial limitations. Some required evaluations, such as environmental responsibility, add extra financial pressure. As Antoniolli says:

How would you be able to improve your environmental impact? But you're giving me less money, so how am I going to do it? I'm also going to be penalised because I'm not fixing the windows, and I'm wasting electricity and heating. That is all a change reaction. You give less money for one thing, and you cannot demand improvement for something else because the two things are connected.

In this way, funding-related evaluation processes can lead to tough decisions, such as cutting back on the number of exhibitions or compromising on environmental improvements due to financial constraints.

A final aspect of the externally driven evaluation that is worth mentioning is that it changes with policy shifts and the wider political climate, rather than with evaluation needs. This creates uncertainty. One example is how ACE employs 'relationship managers', who interacted more fully with NPOs in previous funding rounds than they do in the current one. Another example is the Conservative government's policy of 'levelling up', which aims to support UK regions outside London. In the arts, this has meant moving funds away from London-based institutions in a zero-sum exercise. As the director put it, in taking such actions, ACE is 'not distributing money; [it's] distributing lack of money.'

Internal Evaluation

To face these difficulties, Gasworks has incorporated its own evaluation criteria, which goes beyond the official evaluation system. In this sophisticated internal system Gasworks balances statistical evaluation and more nuanced, reputational assessments, drawing on both formal and informal criteria for evaluation, including risk registers, audience surveys, reports for other (non-ACE) funders, and conversations with artists and staff. The impact and quality of the activities are measured through regular monitoring of media coverage, artwork trajectory, and audience and artists' feedback.

Antoniolli explains Gasworks' approach to evaluation:

We evaluate every programme that we do. Part of raising public funding, and also private, is the fact that we always report on every project that we do. We also have to monitor audiences and programmes. That means we regularly evaluate the strengths we have, our difficulties, how we can improve them or how we use that information to think we should do more of this, less of that.

At the same time, the director emphasises physical presence at the headquarters and regular interaction with artists and staff to gauge the success and impact of their initiatives. He points out, relative to the resident artists:

Artists are ten steps right over, two meters away from my office. If an artist is not having a good time, I get to see it. Different if we would have hundreds of staff. If the toilets need cleaning, and there is nobody around of course, I'd clean them. There's no other degree of separation.

He argues that, in contrast to large cultural institutions, where adjustments might take a long time, at Gasworks there is a sense of immediacy:

When things go wrong, it takes half an hour you know and that changes everything. If the website has the wrong information, it takes us one and a half minutes to change. If you're in a big institution, you'd have to call a department, and another department that gets the designer. There's none of that here. It's a question of scale.

This suggests that informal evaluation is constant and ongoing.

'Co-Created' Evaluation

Gasworks' Participatory Programme, described above, includes an alternative form of evaluation, which goes beyond the official requirements imposed by NPO status and ACE and the formal and informal internal evaluation conducted by organisational personnel. We have called this 'co-created' evaluation (for lack of a better term). Gasworks has created a 'Participatory Advisory Board' and involved this body, comprised of individuals from outside the organisation, in organisational activities. This advisory body is separate from Gasworks' Board of Trustees. It has no governance function, but nevertheless, plays a pivotal role in providing feedback as well as guiding and enriching the artistic projects relative to the needs and aspirations of the participating communities.

The Advisory Board meets 12 times a year and includes representatives of local partners, previous participants, and a mental health advisor who offers a guide for safeguarding practices for all those involved in the programme. This board helps steer the Participation Programme, and to recruit and mentor the current resident artist. Importantly, board members are paid for

their time. Further, as part of the evaluation process, Gasworks paid resident artists and community participants to write about their experiences with the Participation Programme (Gasworks 2020). As Sandoval Limari (coordinator of the Advisory Board) puts it:

This form of evaluation is at the heart of the programme. There's something about caring that is also part of the evaluation process. The [advisory] board is that body where we practise all the values of equality and inclusivity. It's where we translate, so everybody can understand; where we all have equal vote, where we shortlist the artists that are going to be part of the programme; where we think how we're going to use the money. It's all there, in the board.

Image 6. Advisory Board meeting for the release of the Evaluation Report of the first two residencies of the Participatory Programme.



Source: Courtesy of Gasworks.

This board also promotes transparency, equality, and financial support for members, which includes asylum seekers among the range of community participants. Legal restrictions prevent direct payment to refugees seeking asylum, but Gasworks offers a stipend for food and travel expenses to all community members attending board meetings (including refugees). This meant that everyone around the table is compensated for their time, just like other staff members and artists in the organisation. In this sense, 'co-created' evaluation also supports key values promoted in Gasworks, showing that valuation and evaluation are often closely linked.

Discussion

Regarding the Values of Cultural Diversity, Equality, and Inclusion

As our research shows, Gasworks embraces EDI values, instantiating them in specific actions relative to target groups (e.g., Latin American artists, LGBTQI+ individuals, African refugees, and local community members, especially migrants). Gasworks sees such values as flexible, as the specific focus changes with the needs of its communities. Further, Gasworks resists the status quo as it creates an alternative progressive vision that challenges the definition of contemporary arts as restricted to a narrow Western, male, white paradigm. Moreover, Gasworks values not only multiple, decentred geographical perspectives, but also the varied gender, race, and sexual imaginaries with which their international artists identify. At the same time, Gasworks enacts an innovative model of community engagement and offers a new approach to contemporary art and social impact.

Arts Council England stipulates in funding agreements that National Portfolio Organisations report on how they achieve EDI goals. Such externally mandated evaluation is seen by Gasworks as beneficial in focusing sector-wide attention on values that Gasworks has already embraced at the organisational level. These evaluation requirements anchor the definition of EDI values in practice. Gasworks' activities around EDI show an adaptable, expansive approach to these values. In contrast, mandatory reporting forms are largely reductive and constraining, pointing to a tension between the state actor and the arts organisation in the implicit definitions of EDI. Nevertheless, Gasworks has learned to play within the rules to develop and implement its vision on EDI themes within the framework of its NPO status.

It is important to note that in this case study, tensions between or about EDI values did not emerge within Gasworks, due to organisational configurations that support such values. A coherent approach emerges because its small size means personnel work closely with one another. Further, Gasworks' founding principles sought equality, diversity, and inclusion, even before this was required by state funders. Their clear, long-standing mission also contributes to coherence. Nevertheless, EDI values sometimes stand in tension with other types of value, such as economic value, as Gasworks feels the pressure of the current economic crisis.

This case study suggests that institutional configurations supporting genuine engagement with EDI values include a unified organisational culture and a clear organisational mission that privileges aspects of EDI. The case study points to importance of organisational founders, who established Gasworks specifically to support values now called 'EDI'. Similarly, the existence of funding, in this case ACE funding based on NPO status, supports EDI values as the requirements of the funder and the goals of the arts organisation work synergistically (but not without tension) in this regard.

Regarding Evaluation Systems

Our results show that evaluation processes occur on different levels. Externally driven (official) evaluation was undertaken by the arts organisation, using a combination of self-set targets and self-reporting set within pre-existing reporting proforma. It is formal and ex-post but with ex-ante elements. As this evaluation is undertaken by the arts organisation itself, it cannot be described as 'external', but nevertheless, it is required by an external body and is externally

oriented. The organisation also evaluated internally in a continual, contemporaneous manner in an informal sense, but also included formal, ex-post means, such as audience surveys. Gasworks also used an innovative process, which we called 'co-created' evaluation, where external actors were invited, and paid, to contribute to organisational processes and to give feedback. There are formalised elements to the 'co-created' evaluation which again is both contemporaneous and ex-post.

Gasworks did not report contradictions across the externally driven, internal, and 'co-created' evaluation processes. All were seen as necessary and useful for different reasons. However, several tensions emerged around the 'official' evaluation processes. In the UK context, specific types of evaluation are required of organisations in receipt of state funding. As mentioned, arts organisations must demonstrate impact, reach (serving sizeable and diverse audiences), and commit to equality, diversity, and inclusion as an integral part of the funding agreement. During the interviews, Gasworks' staff members highlighted several tensions regarding the official evaluation process. They expressed concerns about the current 'one-size-fits-all' reporting system, which does not adequately capture the complexity of their organisation's impact and is sometimes not appropriate to it. For instance, expecting a year-on-year increase in audience numbers does not seem suitable to an organisation specialised in emerging artists. Gasworks also pointed to the loss of a previous, more personal approach by ACE through relationship managers. In the past, Gasworks reported, regular meetings and open conversations allowed for clearer advocacy and a two-way dialogue. By contrast, the current approach is more distant and inflexible.

The evaluation required by ACE also took significant amounts of time, which was perceived to take time away from other activities, and in this way was perceived as a constraint. However, Gasworks also understands that such evaluation procedures are necessary to secure crucial funding. Evaluation pressures are felt harder during the current cost of living crisis when the increasing inflation reduces the financial value of grants and some activities are curtailed. Targets do not change even as funding to achieve them shrinks.

More broadly, state funding is affected directly and indirectly by the political climate (even though ACE is an arms-length body ostensibly free of party-political influence). UK government austerity policies, for instance, reduced the total amount of funding to the arts in the last decade. A more recent policy to 'level up' funding by shifting support from London to the rest of the UK has led to concern. Both the director and co-director expressed uncertainty about the future, particularly after the close of this three-year funding cycle. This situation speaks to evaluation in the sense that official evaluation procedures are shaped by the wider political climate, even as arts organisations conduct their own evaluations in parallel with externally driven ones. Moreover, uncertainty over funding is an additional hurdle for arts organisations to overcome as they aim to enact the values of equality, diversity, and inclusion in their organisational structures, programmes, and activities.

4.2. Case 8: Nottingham Contemporary

Presentation

The Nottingham Contemporary is one of the largest public galleries for contemporary art in the UK (<https://www.nottinghamcontemporary.org>). It was founded in 2009, when it opened in a commissioned building in the centre of Nottingham, a regional city in the East Midlands. The city itself is in the centre of England; it is a medium-sized, diverse city (eighth largest in the UK) and has two universities. Nottingham Contemporary has a young audience base, given that half of its audience members are under 35 years old.

Image 1. The Nottingham Contemporary, Entrance.



Embracing the tagline ‘Where art connects’ as its main vision, the Nottingham Contemporary has developed an international agenda in contemporary arts, including world-class exhibitions, live programmes, and a rich agenda of engagement with the community. The organisation supports artists at different stages of their careers, from first-time solo shows in the UK to surveys of internationally renowned figures. Many of its exhibitions have toured nationally and internationally. It also commissions major new works. Since its opening in 2009, the Nottingham Contemporary has received two million people and presented more than 50 shows.

The Nottingham Contemporary is a registered artistic and educational charity and has secured just over £1 million GBP per annum from Arts Council England (ACE) as a National Portfolio Organisation (NPO) for the period 2023-26 (Arts Council England, 2023b). ACE is its largest funder. It also has three strategic partners, the Nottingham City Council, the Nottingham Trent University and The University of Nottingham.

Taking pride in their innovative research and learning programmes, the Nottingham Contemporary is currently going through a complete process of redefining and reframing traditional perceptions of EDI issues. As part of this journey, the organisation is moving toward more progressive narratives involving hospitality, wellbeing, and power transfer. It has also set high targets for audience expansion and diversifying its workforce. This transformation has had consequences for the organisation's aims, vision and goals, its workforce, and its audiences, as well as evaluation and programming. In this report we analyse a series of initiatives that engage with various aspects of this transformation.

Methodology

Our analysis is based on qualitative methods. During July and September 2023, we conducted interviews with the Nottingham Contemporary staff and an associated artist:

- Salma Tuqan, Director
- Amanda Spruyt, Head of Learning
- Andy Batson, Head of Marketing & Visitor Experience
- Sam Harrison, Visitor Services Supervisor
- Charlotte Tupper, Nottingham Contemporary Associated Artist

Interviews covered content and programming, in general, and activities and initiatives related to EDI and the composition of the organisational team. We also asked how the organisation judged its successes (or failures) and their perception of UK cultural policy, especially around EDI support.

In addition, we conducted fieldwork by attending different events taking place in the summer of 2023, including a workshop co-developed alongside a local organisation, Rainbow Parents Carers Forum, which involved a forum for children with special education needs. This event offered an experimental engagement with the ongoing exhibitions *Holding a Heart in Artifice*, by Abbas Zahedi, and *How many giraffes are in the air we breathe?*, created by the artist Eva Kořátková in collaboration with a local primary school. We explored a new partnership that Nottingham Contemporary established with Juno, the largest charity in Nottingham working with domestic abuse. The programme 'Young Voices', a 3-year project dedicated to children and young people who experienced domestic violence in Nottingham, involves sessions that suggest ways that contemporary art might contribute to forms of healing, empowerment, and survival. Given that the activities involved underaged participants (mostly young people between 15 and 18 years old), we did not observe the sessions themselves due to confidentiality. We nevertheless learned about the programme via a de-brief session plus an interview conducted with Charlotte Tupper, the in-house artist in charge of facilitating the sessions. We were also given access to some unpublished, internal documents.

Findings

Values of Diversity, Equality, and Inclusion

We found that the Nottingham Contemporary had a progressive approach to EDI values, embracing them, but moreover, moving beyond a 'traditional' view of EDI toward a much more active definition which involves concepts such as hospitality, wellbeing, and power transfer. The Nottingham Contemporary embedded such new 'EDI' practice in three key ways: a revision in the organisation's stated values, changes (actual and anticipated) in the composition of the organisation's staff, and programmes that place contemporary art in the role of public service.

During her interview, the new Director Salma Tuqan (appointed in March 2023) asserted that while contemporary arts centres are often viewed as a sum of their exhibitions, 'it's not our full picture'. By contrast, she aims for the Nottingham Contemporary to be recognised as an experimental art centre, well-rooted in the city, programming artists with different abilities, and including many more non-Western perspectives. She stated that many arts organisations:

are more reliant on the market and on blue-chip galleries.⁴⁴ When I look around the UK context, I see more and more that spaces that used to be very much about risk-taking experiments, don't have that luxury because they're economically under so much pressure. So, there's a lot of repetition of artists who are showing in major blue-chip galleries. For us, it is important to maintain this commitment [to experimentation]. It feels even a political act to maintain it in a scenario and in a context, which is very economically precarious.

Tuqan used this commitment to exhibiting non-western and experimental art while performing a wide spectrum of public and civic functions to support her argument that the Nottingham Contemporary 'is about connection, it's about well-being, and it's also about the fundamental role of art, enabling people and bringing people together and creating a gathering space.'

During the last few months, the Nottingham Contemporary has been involved in a process of revising its own narrative in relation to EDI issues. As Tuqan explained, the organisation has moved to a consultative approach that has included 'significant work, culture shifts in terms of how we address what EDI is.' In that process, the Nottingham Contemporary have moved, in her words, 'from an organisation that maybe echoes the usual traditional verticality and hierarchy to an organisation that is much more about listening, understanding and making decisions collectively.'

In this consultative approach, the term 'diversity' was described as 'dated and not quite sufficient', as argued by Amanda Spruyt, Head of Learning. Andy Batson, Head of Marketing and Visitor Experience also expressed his doubts regarding the term 'inclusivity'. He said, 'I'm not completely convinced by the "inclusive" word. It's not about just inviting people to be involved in the thing that you care about. It's about letting them work with you to define the things *they* care about.' Adding, 'That's why I tend to like to put "equity" there because some of it's about handing over power.' He explained that within the re-shifted narratives, audiences should not

⁴⁴ The term 'blue-chip' refers low-risk investments, and in the art world, a blue-chip gallery is a commercial gallery that sells artists with stable and established reputations (and therefore, good investment potential).

be conceived as 'hard to reach', as this implies a fault on the audiences' side. Instead, he prefers the more progressive description of 'underserved'. As he explains, 'We're not serving them enough then it's our fault and I think that's where they are.'

The full round of consultation, which included workshops, focus groups, and cross-team conversations, resulted in a new set of values with which the organisation identifies. These values are expressed in the words *Brave*, *Hopeful*, *Open*, and *Resourceful*, and the goal is for these ideas to permeate all areas of the organisation. As Spruyt explained, 'We are only beginning to roll out how these new values can become living things. We have that as being less building-based, less about people coming into [it] and more about the relationships that we form, and what we do within the city and of use to the city.' The Head of Learning, Spruyt, described the process as involving extensive conversations with both the staff team and an Inclusion Working Group. She emphasised that a genuine transformation needs to involve every level of the organisation, including the boards, management team, exhibition programming, thematic considerations, demographics, as well as the workforce itself.

The new set of values aim to challenge assumptions about contemporary art that might be held by potential audience members. Bateson explained:

Sometimes contemporary art galleries can feel as hostile spaces: they're cold and they're empty and they're echoey. There's so much [social] class still at work within the visual art world, I still feel that sometimes black and brown artists, or artists with disability, are treated a little bit like curiosities.

Some attendance barriers were discovered after the pandemic lockdowns, when staff found people who enjoyed some of the online activities were reluctant to come into the physical spaces of the Nottingham Contemporary, perhaps feeling intimidated by its modernist building. As Batson put it, 'It could be felt as building built by white people – and whether they would admit it or not – for white people.' To challenge this, the organisation is working on access and interpretation as inherently linked. While the Programming team works to support artists to incorporate accessibility in their practices, the Audience team is developing new vocabularies for exhibitions to bring more audience into the space. 'We want to attract people who might feel that contemporary arts could be upsetting and could be a put off', said Batson.

Further, in embracing this process of self-transformation, the Nottingham Contemporary has perceived its EDI commitment as an ongoing practice of learning, social justice, and radical accessibility, which involves providing a social service for the surrounding community. Indeed, the organisation has committed to making one out of the four exhibitions each year as locally embedded in the city or done in a process of co-creation with local organisations. 'To work properly in EDI [is] to think of where power sits', stated Batson, and to challenge that. 'It is not enough to put in a gallery a picture of someone who's got brown skin' but rather, the artworks must be embedded in the community, it has to be sowed in an actual transference of power', maintained Batson.

Here, we briefly describe a set of EDI-related activities and initiatives undertaken by the Nottingham Contemporary, starting with the organisation's own staff. We also discuss initiatives that articulate with the organisation's stated values and one programme that demonstrates the understanding of contemporary art as public service.

An organisation 'that looks, speaks and thinks more like the city'

As part of its successful application for Arts Council NPO funding for 2023 -2026, the Nottingham Contemporary stated that their 'three-year ambition' was to promote equity and inclusion across workforce, audience, programmes, and partnerships by addressing inequalities of power and access, stipulating that by 2026, '25% of the Nottingham Contemporary staff and audiences will be ethnically diverse, 20% disabled and 30% from lower socioeconomic groups' (Spruyt, 2023).

To meet this target, the Nottingham Contemporary started with its own staff composition. It incorporated a new system of recruitment including a change of language used the job advertisements, a new position to lead the process, and open sessions of conversational exchanges among candidates and staff outside the actual selection. As Spruyt says, 'Sometimes the core is about who's involved. It's about who are our team and who are our partners, who are our collaborators that will really change us as an organisation.'

Sam Harrison, Visitor Services Supervisor, said of these targets: 'We're trying to set ambitious goals relative to reflecting where we are. The overarching statement of our mission, vision, and values is "Where art connects", but this means connecting in *Nottingham*.' To do this, he argues, the organisation should be more in tune with and conscious of its actual audience and the community that surrounds it, and 'part of that, it's to have a workforce that looks and speaks and thinks more like the city.'

In line with these goals, the Nottingham Contemporary's website showcases the buoyant disparateness of its staff both through their separate, self-selected individual pictures, where their personalities are allowed to shine, as well as in photos of all the staff (Nottingham Contemporary 2023a).

Image 2. A heterogenous and vibrant staff.



Source: Organisation's website.

The needs of staff were considered as part of the organisation's values. Upon taking her post of Director of the Nottingham Contemporary, Tuqan led one-to-one conversations with all members of staff to understand 'what they might need from the organisation'. She believes that issues of wellbeing, hospitality, and listening, which the organisation extends to its local

communities, also involves the staff. 'Part of this rethinking of the internal is also how do we be hospitable first internally for our team', said Tuqan. This internal well-being is seen as an important base to support more cross-departmental work and an externally facing agenda such as expanded programming.

During the interviews, we found that the progressive policy of recruitment connects with the organisation's conception of itself as an *experimental* arts organisation. As a long-term member of the staff, Harrison argued:

A greater mix of experience in the workforce is going to have an impact on the range, freshness, and openness of the programs we put on. That should be an aim that allow us to stay relevant and new, interesting, and provocative. That breadth hopefully also allows us to speak and connect more effectively to bring visitors in and give them a good experience. It's good in itself to have a diverse workforce, but the outcome should also be a more creative and effective gallery, which better serves its city.

Thus, the organisations efforts to diversify the staff have wide-ranging implications for EDI values at many levels.

An organisation that is Brave, Hopeful, Open, and Resourceful

The Nottingham Contemporary continues to receive traditional visitors and offer free guided tours. Further, its exhibitions have become key spaces to welcome alternative visitors with a range of programming, including elder people, LGBTQI+ and queer communities (for instance, *Ridykeulous*, a large exhibition focusing on queer and feminist art⁴⁵), autistic children, and other groups with specific needs or interests. On 7 August 2023, we attended a sensory workshop co-developed alongside Rainbow, a local charity and care forum dedicated to parents and children with learning difficulties. Led by in-house artist Sian Watson Taylor, the event offered the opportunity for 20 participants (both children and adults) to engage with contemporary art in a novel way. Participants could lie down in the gallery alongside Abbas Zahedi's *Holding a Heart in Artifice* metallic artworks, sing and play with sounds. Ultimately, they were invited to build an installation with fabric to create 'some sense of comfort and togetherness'. Then, participants could listen to stories on freedom and played with puppets in dialogue with Eva Koťátková's *How many giraffes are in the air we breathe?*, an exhibition, created in collaboration with a local primary school, that offers an exploration of a giraffe's story from the Prague Zoo to the Natural History Museum. A mother of a 9-year-old girl said about this event, 'Of all the spaces we go, this is Charlotte's favourite. She loves being around. Sian [the leading artist] is brilliant.'

⁴⁵ *Ridykeulous* is a curatorial initiative led by the internationally renowned American artists Nicole Eisenman and A.L. Steiner, and guest dyke artist Sam Roeck. It opened in September 2023 and runs until January 2024.

Image 3. Participants of Rainbow's workshop (carers of children with special education needs) at Abbas Zahedi's exhibition



Source: Photo by C. Sosa.

Nevertheless, Nottingham Contemporary faces challenges in generating this kind of engagement with sensitive populations. Spruyt, Head of Learning, outlined some the tensions involved in the engagement aim: 'Most of my team only works on a part-time basis, with little capacity to take on a collaborative project alongside exhibitions.' Despite such resourcing challenges, Spruyt argued that the crucial aspect of engaged project is 'how we and audiences continue to connect, document, and reflect on those exhibitions':

If we're really going to do co-creation, we've got to work together as an organisation to frame that and see what happens after. We need to see the exhibition as a whole, rather than separate parts, to secure a real engagement with the population. What really brings the exhibition to life and brings that meaning, is what happens once it's here and who's involved in creating. And that takes resources, too...

In addition to exhibitions, the Nottingham Contemporary offers other spaces of welcoming. For instance, it has also started another co-created series with Juno, the largest organisation in the area dealing with survivors of domestic violence for its three-year programme *Young Voices*, which is dedicated children and young people. For three consecutive workshops, around 20 young participants, between 14 and 20 years old, arrive to the studio and meeting room to create different pieces of works addressing themes of survival, healing, and empowerment. As Charlotte Tupper, the associated artist in charge of facilitating the sessions, recalled it during the de-brief session:

You just provide prompts like, 'Here, it is something you could try'. And then you take a step back and learn from what's been made in the space and make some suggestions along the way. But you really just need to hand it over.

The produced artwork, which includes masks, prints, and intervened photographs, will be part of Juno's Annual Meeting in November 2023. Nevertheless, as the artist argued, the work created is only one of the aims; another is to show how contemporary art can enable young people to talk to each other and to share their experiences as they're stitching or making. 'The act of doing it is as important as what they created', said Tupper.

These co-created activities demonstrate how the Nottingham Contemporary embraces its new values of being resourceful, brave, open, and hopeful. Sometimes, says Batson, being 'brave' for a contemporary arts organisation also means 'stop worrying about reputation and be more vulnerable'. And he added:

Being more vulnerable is in itself an inclusive action because if you're able to say 'we made mistakes', it has an effect of building trust and authenticity. We've got a lot of fame from the exhibitions we put on, from our live program, from our kind of internationally regarded programme, but I'd like us to also be famous for being very open of the needs of change to become more inclusive.

Here, the interviews show a more active definition of EDI involving co-creation (as opposed to a traditional 'outreach' programme, for example).

Contemporary Art as Public Service: The Warm Hubs

Last winter, from January to March 2023, the Nottingham Contemporary ran the 'Big Room Family Films', a new initiative, internally known as the 'Warm Hubs'. This series of six free family-film screenings was conducted fortnightly, on Sunday afternoons. It offered a warm (both in terms of welcoming and in terms of temperature) and relaxed social space for families and was launched as a response to the cost-of-living crisis. It targeted specific postcodes, local schools, community centres and food banks, aiming to reach disadvantaged families in the Nottingham area by offering them not only a curated series of family-friendly films, but also hot and cold drinks and snacks, mainly within a heated indoor space. The initiative, which cost £2,000, included a partnership with NCT, a local bus company that provided free transportation to people attending the activity.

During that cold winter, the series reached capacity. A total of 622 family participants attended, half of whom were first-time visitors from underrepresented audiences, both ethnically and socio-economically (Nottingham Contemporary, 2023b). In feedback, one of the participants wrote, 'There were plenty of activities to keep the kids engaged, the snacks and refreshments were lovely. And to top it all of it was amazing that NCT were kind enough to give free passes to families. It is helpful for my family in this difficult time' (Nottingham Contemporary, 2023c). Another wrote, 'The film was cleverly picked which is easy to be understood by children. My child enjoy[ed] the refreshments and the movie a lot. Our whole family did have a great time.' The selection of the films included *Princess and the Frog*, *The Big Bad Fox and Other Tales*, and *The Iron Giant*, among other popular, non-verbal, and non-stigmatising family-oriented titles.

While analysing the series, Batson argued that it was crucial that the publicity for it had circulated through unconventional channels. 'From a marketing perspective, we almost worked against ourselves. We closed it off on all our marketing channels, apart from we really funnelled

into particular spaces: schools, community centres, foodbanks. We didn't tell the rest of the world about it'. In fact, when by mistake a member of staff posted an add on social media and tickets went off, they realized it was 'the wrong audience'. 'We had to shut it down and restart the promotion again', said Batson.

In the wake of the economic crisis, the initiative provided a public service that sought to address some of the needs of vulnerable people, needs which had been neglected by government. During our interviews with the members of staff, wide support of the Warm Hubs was ubiquitously evident. In line with the new set of values of the organisation, the initiative showcased the building as a public space ('Resourceful') while providing an unprecedented local response to cope with the crisis ('Brave'). It also offered an inclusive approach and a warm welcome to new audiences ('Open'), and it was committed to socio-economic inclusion ('Hopeful'). In this manner, it also allowed the staff expanding experiences of welcoming new audiences from deprived backgrounds (Nottingham Contemporary, 2023c). As Batson said, 'The Nottingham Contemporary used to be seen as cultures for middle-class people to have something nice to do on a Saturday. Now it feels like we're providing a necessary social good.' And he adds, 'We've been forced down that path to a certain extent by government policy.'

The internal assessments and survey feedback also showed how, in an unintended manner, the initiative increased the organisation's proportion of non-white audience members from 15 to 18 percent. When designing the event, the Learning and visitors' area targeted for an economically deprived audience, not specifically for diversity. 'We weren't thinking "we want more black and brown people", or "we want more LGBTQ people". It was literally about serving people who needed somewhere warm to go in the winter', explained Batson. It was only while examining the demography of the people who came to the events and filled in the surveys that the composition of the audience, mostly from lower socio-economic groups, became evident: attendees comprised 23% South Asian and 23% Black individuals (Nottingham Contemporary, 2023c). Thus, the Warm Hubs allowed the Nottingham Contemporary's to exceed its own EDI targets, as declared in the official evaluation (see below). While the organisation is planning to repeat the initiative the upcoming winters, the series also uncovered some of the evident, but hardly spoken of, tensions regarding EDI targets in relation of system of evaluation, as we analyse next.

Evaluation Systems

Our results show that the Nottingham Contemporary discusses evaluation of two key kinds. The first, a significant system of external evaluation for Arts Council England, is seen as providing positive support for EDI initiatives, even as it falls short in terms of work required, flexibility, allowed detail, level of feedback and quantification. The second surrounds an aim to develop alternative, reflexive approaches, and a desire to build partnerships for more effective and systematic evaluation. A conversational method is emerging in the organisation, and a patchwork of evaluation strategies exist; however, the organisation would like to achieve a more comprehensive, unified system but faces challenges here as well.

An Externally Driven Toolkit

As with all UK National Portfolio Organisations (NPOs), which are funded by Arts Council England (ACE), the Nottingham Contemporary is expected to set its own performance targets and to

evaluate progress in quarterly reports submitted to ACE. The formalisation of EDI values in UK cultural policy has also led to requirements for NPOs to provide data on the representation of diverse groups across various areas, including programming/cultural offer, artists/creators, audiences, employment, and the development of inclusive workplace cultures. The Nottingham Contemporary is strongly marked by this formal externally driven (official) evaluation. As Spruyt puts it, 'We've got those headliner NPO statistical things around inclusion and relevance, around the environmental sustainability and [other requirements]. With each of those, for inclusion and for environment and we've got action plans. So, you measure particular outcomes and outputs as part of that. It's about measuring progress against that action plan.'

In this pressured evaluating context, and despite Covid's general aftermath and its effects on audience numbers, the Nottingham Contemporary achieved the set of targets it had set for itself, met all key ACE priorities, and retained the same funding level of over a million pounds for the 2023–2026 period. As Harrison (Visitor Services Supervisor) explained: 'We seem to be meeting the promises we've made. There's a sense that we've successfully reopened since Covid. That was a big deal for us, especially since this part of the city of Nottingham has suffered so badly economically in the last four years.' Still, he defined the future challenges of the organisation in terms of 'how we increase the awareness of our programming and make it message, appealing messages about it to the outside world.'

Despite accomplishment shown by the official numbers, Spruyt's perspective as Head of Learning, was not optimistic about future cultural policy for the sector. 'I don't feel that the arts are at all valued in UK policy at the moment', she said. In particular, she recalled a public discussion on funding in which the former artistic director of London's National Theatre, Nicholas Hytner, suggested that the Arts Council should use sports as a model for supporting the arts; in other words 'that cultural institutions should be like sports, and you should have the professional sports and then community sports and arts should be like that.'⁴⁶ 'I do not agree with that', she said.

Nevertheless, Spruyt did value the increasing importance ACE places on engagement, which has become fundamental for the Nottingham Contemporary in terms of EDI practice. She argued that local approaches are important, stating that 'engagement work should not be led by...[a nationally uniform, elitist] bombastic kind of view of what the arts are.' She welcomed the current Arts Council approach in which 'local people are cultural producers within their own approach and are keen to be part of that work and support it.'

In a broader sense, this focus on local people also accords with national government policy of 'Levelling Up', which requires that funding of policies across a variety of sectors should be redirected from London to the regions. Although the Nottingham Contemporary's budget stayed the same, there is a perception that this change in policy might facilitate a profound EDI transformation at Nottingham Contemporary, notably around developing art projects with community groups. Such co-produced projects can engender 'wider definitions of art and

⁴⁶ Here, Spruyt was referring to an opinion piece published by *The Guardian* newspaper in which Hytner commented on ACE's *Let's Create* strategy. He argued that this had expanded ACE's remit beyond supporting arts institutions, as traditional, to also include supporting all adult creativity. He proposed dividing support of arts organisations from support of creativity, in the manner that the sports sector separates all-star teams from recreational sporting activity.

culture’, as Spruyt argues. ‘It can only be good for that, for that relevancy, for that kind of connection to people’s lives where they are.’

Nevertheless, the organisation has found the officially required external evaluation to be less than satisfactory in assessing their own achievements in the area. The Nottingham Contemporary’s leadership stipulates that it fully embraces the need for accountability in publicly funded work. Moreover, they actively work towards accountability and transparency, and welcome ACE’s ‘investments Principles’ (ACE, 2023c). However, the level of bureaucratic pressure and demands connected to NPO status increases staff workloads, and, coupled with the specificities of the externally created evaluation worksheets, is often perceived as overwhelming. Spruyt explains, ‘You get lost in doing the NPO [paperwork]. They’ve got pillars, they’ve got objectives and outcomes, they’ve got investment principles. There is always like 20 documents and guidance documents and your head starts to spin.’

The consensus in the organisation is that this evaluation system should be improved from ACE’s side. The interviewees particularly noted the constraining nature of the ‘one-size-fits-all’ format embedded in reporting forms. For instance, Spruyt said, ‘I wondered how they would differentiate one organisation from another. It misses that depth and that character. You cannot give an account of the character of the organisation with same framing questions.’ However, recently, there is evidence that ACE is moving into a more flexible direction. For instance, the new audience survey that all NPOs are required to use, allows organisations to include their own set of questions (ACE, 2023d). Previously, explained Batson, ‘We used one [survey form] that was really closed, and you had to pay money to change questions. The new one, it’s quite customisable: you can just save and add your own questions. It’s going to be much easier to manage and it will give us a much clearer sense of our audience.’

Another concern interviewees raised is the limited space provided for describing targets and aims. ‘I’ve always got a lot to say about what we want to do and what we’re about and things like that. And there wasn’t very much space for that’ (Spruyt). Further, interviewees noted that the feedback received on required reports was not particularly useful. For instance, Spruyt noted, ‘You get this feedback where your statements just reflected to you with just the grammatical change, just like literally given me the same three paragraphs back.’

A key objection to the required formal evaluation is that it largely rests on quantitative metrics. As Batson puts it, ‘ACE uses one single evaluation tactic: how many people, from whichever group, what value for money did we get for every pound we spent, how many people did this kind of thing. And that neoliberal way of measuring culture isn’t right’. In this sense, the organisation criticises measuring success only numerically. Bateson continues:

It ultimately comes down to economics. It doesn’t come down to how happy or nourished people feel. Those measures don’t exist [in the current system]. It’s accounting, but it’s accounting with people.

Further, the timescale of the official evaluation is seen as problematic. Batson comments, ‘Success is not necessarily about how many people enter through the door, it’s more about if in three or four years’ time your doors are still open. And also, what do the people that are coming in look like?’ Moreover, from that perspective, numerical EDI targets have the potential to become merely rhetoric. As Batson puts it:

We’re to spend so much time categorising and saying ‘x percent of people are this’. I don’t see at government level a genuine desire to understand or empathise or engage with particular communities beyond ‘isn’t it great that Britain’s so diverse’.

For that reason, the Nottingham Contemporary is looking for an alternative, and more complete system of evaluation that could go beyond the assessment marked by metrics while incorporating more reflective dialogues with what they call 'critical friends'.

Towards an Alternative System: Reflective Practice and Critical Friends

Nottingham Contemporary developed its own internal systems, but the organisation sees that process as incomplete. Bateson says:

To meet our business objectives we measure metrics, we look at demography and we measure those against our targets, we look at visitor numbers, or we measure those against our targets, we look at income and we measure those against our budget.

Despite having worked on evaluation for over 20 years, Batson joked that he still does not know 'what good evaluation looks like', but he adds, it 'surely has to include conversation.' Good evaluation, he says:

can give you a sense of how it did or didn't work and the next stage of evaluation should be, or what then is going to happen the next time if we do something similar. We're moving away from an idea of evaluation as a set of quantity benchmarks. We're going to have some work on quality, into more reflective evaluation and that's where the questions around whose voices get to sit in around the table on an evaluation.

These more conversational evaluation methods are still emerging.

The Nottingham Contemporary aims to integrate an organic, conversational system of evaluation throughout the whole organisation. As Spruyt reports:

We've still got to develop the process by which we sort of achieve that across the organisation. We've got pockets of it within Learning, particularly because a lot of the actual programming are being action research projects in themselves. But we haven't got a streamlined system across the whole organisation [...]. It's quite a patchwork of systems. It's a very virtual, even from Learning programmes. A lot of our funding is external as well, so you still need to respond to each of the programmes or projects that you're working with. We need something to help frame it and bring it together.

The Nottingham Contemporary has taken steps to achieve this aim as part of its latest NPO submission. Here, the organisation proposed that a 'reflective cycle' be included in the next official evaluation round as a priority.

The evaluation reports for other external funders are part of the 'patchwork' Spruyt refers to. For instance, the Foyle Foundation and Weston Culture Fund are the main funders of the project 'Future of Future'. This project involves 'an immersive year-long research, engagement, and artistic programme which placed young people at the heart of the programming and offered unique work experiences and platform' (Nottingham Contemporary, 2022; 2023d). Both reports (one for each funder) include a very detailed account of budget, objectives, outputs, outcomes, and overspend and included both reflection and metrics related to participants, budgets, sources, and visitors. This level of evaluation is useful but also exceptional as it is challenging to produce. The Nottingham Contemporary would like to be able to undertake more of this detailed evaluation on its regular programmes.

Related to this aim, the organisation is seeking to find a new system of evaluation, which it envisages achieving in collaboration with new 'critical partners'. In Spruyt's words, 'We need

some more capacity and some expert help to develop another mechanism, which could allow those reflective conversations, systems will evaluate what you need here from inside.’ A key audience group is younger adults (under 35-years-old), and the Nottingham Contemporary is eager to transform its public into allies to create the proposed ‘reflective cycle’ of assessment mentioned above. To achieve this, the organisation has attempted to expand the existing partnerships with the two universities based in the city of Nottingham. However, initial attempts have not progressed due to challenges mainly related to the fact that under contemporary neoliberal governance, universities must capitalise on the expertise of lecturing staff. Thus, the universities framed such potential evaluation support as a knowledge exchange partnership. However, said Spruyt, ‘that may cost £22,000 or something, and we haven’t got a spare £22,000 to invest.’ Thinking ahead, she envisioned a new system as embedded in the internal capacities of Nottingham Contemporary which worked closely with potential critical partners, rather than as an external body evaluating from outside. On this ideal evaluation system, she said, ‘It’s got to fit us as an organisation and fit within systems that already exist. But we could do with a kind of external eye and a perspective to help us do that.’

Discussion

Regarding the Values of Cultural Diversity, Equality, and Inclusion

The Nottingham Contemporary has embarked on a process of self-transformation that involves challenging traditional EDI assumptions. In this process, traditional EDI approaches have been described as dated and vertical. By contrast, the institution proposes a new set of values that involve a transference of power that could help it to reach ambitious EDI targets for its staff and audiences. These include the organisation’s stated values, ‘*Brave, Hopeful, Open, and Resourceful*,’ the importance placed on hospitality and welcoming, and contemporary art as public service. In this context, the Nottingham Contemporary has drawn on and developed a critical definition of contemporary art as embedded in the community that it serves and as an activity that contributes to the lives of local people.

Against the critical environment of stained economic crisis and funding cuts by government across a wide variety of sectors, the definition of EDI as good practice emerges as a constant work-in-progress, a process of learning. Rather than defining itself (only) as a world-class art centre that is capable (as it is, and it does) of putting together experimental exhibitions on themes around climate change, LGBTQI+ or postcolonial matters with invited international artists, the Nottingham Contemporary also embraces a profile that allows for mistakes and vulnerability as a condition to build authenticity connections to its audience. A key aim embedded in the new set of expressed values, is that enacting EDI values must be comprehensive and genuine, not just nominal or rhetorical.

The value changes in the Nottingham Contemporary have been facilitated by a change of personnel, such as the new director, who aim to change the organisation from the inside out. The diverse staff support the hiring of new, even more diverse staff, in a virtuous circle. Staff then devise and run innovative and inclusive programming, increasing the connections to communities. The changes also, at least in part, emerge from the requirements for state supported NPOs to engage with EDI issues, although the Nottingham Contemporary has gone above and beyond the basic requirements in this regard.

Regarding Evaluation Systems

The process of radically embracing EDI practice sheds light on limitations and deficiencies of the evaluation system, mostly marked by compulsory NPO cycles that strongly rely on metrics and the limited 'one-size-fit-all' approach. Interviewees at Nottingham Contemporary consider externally driven evaluation as necessary to secure public funding and agree that Arts Council funding has encouraged a sector-wide attention to EDI issues. Nevertheless, they perceive ACE's evaluation system as embedded in a neo-liberal approach, largely (or only) marked by numbers and metrics. They find that this system is reductive, that it does not capture the complexity of the organisation, and it does not evidence a genuine desire to understand, develop empathy for, or engage with expanded communities. (ACE may have started to perceive this limitation, and offered some new space of maneuverer to art organisations via the new audience survey that allows organisations to develop their own questions.) Our participants also report unnecessary bureaucracy, increased workload, and pressure to 'do more with less' funding.

In contrast to the externally driven evaluative system related to its public-sector funding, the Nottingham Contemporary has developed a range of other evaluation methods that includes metrics (of participants, budgets, sources, visitors) coupled with conversation and critical analysis. However, this has not become a complete system but exists only in 'patchwork' form, sometimes motivated externally in response to private funders.

In this context, the Nottingham Contemporary is eager to build up a more 'reflective', 'conversational' and flexible evaluation system, which can reach the whole organisation allowing them to showcase the depth and impact of their expanded EDI work. Being based in a university city, the organisation perceives the two local universities as potential 'external critical partners' who could help to improve their evaluation system and offer critical and reflective support. However, the marketisation of the UK academic sector works against this, as support from that sector is less likely to be offered pro bono. Even so, the organisation has requested the need of a more 'reflective practice' as an internal target within the next NPO evaluation, and it is eager to find out proper and possible creative alternatives.

Certainly, our fieldwork and interviews conducted in the Nottingham Contemporary has showed that an ideal system of evaluation should be embedded in the internal capacities of the organisation, working closely with all their staff and their audiences and local communities, instead of coming as an external force. Still, an external view is also seen as useful when it actually engages with the organisation's needs and goals (as in reports for the private funders). An integrated internal evaluation system, perhaps with the input of 'critical partners', has yet to fully emerge at the Nottingham Contemporary. In the meantime, the organisation has already started to resemble more closely the city and the community it serves.

PART 2. COMPARISON

In this comparative and concluding section, we will present the cross-cutting lessons learned from comparing the cases. We will first look at some of the answers to our two main research questions before concluding with comparative findings.

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

1.1. Defining the values of equality, diversity, and inclusion: a plurality of perspectives

The cases presented in this deliverable are full of lessons about the way in which European cultural institutions integrate the values of equality, diversity, and inclusion. The first lesson is that, while these values are rarely perceived as constraints and are not called into question, they do not all make unambiguous sense for the institutions studied.

The case studies highlight five definitions of inclusion. The first is what we might call the participatory conception of inclusion: the concept of inclusion here refers to the idea of encouraging the active participation of laypeople in the artistic creation process. This concept can be broken down into two sub-categories, which can be found in most of the cases studied. On the one hand, we can see that some institutions encourage participation in a practical sense. Examples of this concept include the PELE association, which invites local people to co-construct the very place that houses the structure, Adega; the Austrian pavilion at the Venice Biennale, whose curators developed the Pavilion's project around the idea of actively involving local citizens, aiming to provide them a place to discuss and co-design, associations and residents; Gasworks and its participatory poetry workshop, which led to the publication *We Exist*; and the co-creations developed by the Nottingham Contemporary with the Rainbow and Juno associations. On the other hand, most of the institutions studied develop an intellectual conception of participation, mainly through educational actions – Tanoda for disadvantaged Roma and non-Roma children by the Rácz Gyöngyi Community Centre (RGYCC) or the English courses offered to Latin American migrants by Gasworks – or workshops – NőszíRom Club (RGYCC). Here, inclusion is understood as the ability to elicit cognitive engagement from target audiences.

The second conception of inclusion is territorial: here, it is a question of proposing actions adapted to a specific socio-territorial context, which generally corresponds to the territory in which the institutions are based. This second concept is expressed by almost all the actors interviewed. Territorial inclusion is obviously present in the discourse of institutions directly oriented towards the development of actions targeted at a well-defined territory - RGYCC and Glove Factory in Hungary, PELE and Sonoscopia in Portugal, Gasworks in the United Kingdom - but it is also a dimension well integrated by institutions whose territorial action is not the object a priori. For example, both the Municipality of Milan and the private company 24Ore Cultura are keen to reach out to the residents of the neighborhoods around Mudèc through public art. Nottingham Contemporary is carrying out the same kind of reflection, and the Biennale's Austrian pavilion is proposing to focus its programme on the exclusion of Venetians from and as

a result of the exhibition.

The third conception of inclusion could be described as economic: it involves considering the inclusive nature of an action in terms of its widespread success; an inclusive action would thus attract the greatest number of participants. Private economic actors mainly express this conception. 24Ore Cultura explicitly expresses it through the Machu Pichu exhibition. Reference to this concept is much more implicit among the other actors interviewed, essentially, as we shall see later, in relation to the evaluation methods developed by these actors.

The fourth concept of inclusion follows a logic opposed to the previous one. Here, inclusion means specifically addressing excluded or marginalised groups. Here again, this concept, which could be described as qualitative inclusion, is found among all the actors interviewed and partly overlaps with the territorial concept of inclusion. Finally, a fifth concept is what might be called inclusion through content or offer. This involves adapting the content produced in order to facilitate access by demand. Two specific strategies can be seen in the cases analysed. One involves adapting the offering by explicitly addressing a target population. This is the case, for example, with the *Il Muro che unisce* project produced by 24Ore Cultura, which uses street art to appeal to an underprivileged audience, or *Big Room Family Films*, a programme developed by Nottingham Contemporary and aimed directly at families in difficulty. The other is to adapt the content to make it accessible to as many people as possible. This strategy has been developed by the two institutions in charge of programming at Mudec: while the private partner 24Ore Cultura favours a strategy of edutainment (*Machu Pichu*), the public partner opts for content that offers different layers of reading (*Rainbow*).

The notion of diversity can also be interpreted in different ways. Firstly, it can be understood in terms of the artistic offering and/or the target populations. The distinction here largely overlaps with the inclusion strategies mentioned a few lines above. However, we can still see that the programmes developed in the various institutions analysed focus primarily either on creative strategies or on target audiences. Some programmes are essentially aimed at artists, such as the international residencies set up by Gasworks. Others, as we have seen, promote cultural diversity through dissemination, whether to a broad or targeted audience. Diversity can also be understood from a transversal or sectoral angle. In the first case, a specific form of diversity is highlighted, whether artistic, social, or ethnic. In the second case, programmes promote different forms of diversity without necessarily ranking them.

Finally, the value of equality can be understood in potentially contradictory ways. The first equates equality with impartiality. This is the case, for example, of the vision developed by the Biennale when they explain that equality is respected insofar as all participants pay the same admission price. The second refers more to the notion of justice or even positive discrimination. This is the case, for example, when institutions offer free access to their events or when they target marginalised audiences or groups as a matter of priority.

2. Values in tension

As we can see, the values of equality, diversity, and inclusion, as perceived by cultural institutions, overlap to a large extent. While they may appear to be complementary, these different definitions can also be sources of tension for institutions.

First of all, we can identify the tensions intrinsic to this set of values. For example, there is an

underlying tension between the egalitarian conception of equality and inclusion. Indeed, equal treatment in terms of conditions of access for the public to events can run counter to the inclusion of marginalised populations if, as in the case of the Machu Pichu exhibition or the Biennale, access is not free.

Beyond these intrinsic tensions, which we will not list here, the definition of the values of equality, diversity, and inclusion can be a source of conflict between institutions. The case of the opposition between the Biennale and the Austrian Pavilion is a perfect example. What is perceived as inclusive by one actor is perceived as exclusive by the other; the two actors are also opposed to the issue of equality. We can see a conflict emerging between an egalitarian conception defended by the Biennale and a conception of justice defended by the Austrian Pavilion.

The cases analysed also show that institutions can contest the definition of these values. The Nottingham Contemporary, for example, describes the notion of diversity as dated and limited and challenges a vertical vision of inclusion that would involve the public in projects defined by the institution rather than including them in the process of defining the projects themselves. Similarly, the institution prefers not to describe the target populations as 'hard to reach', which it believes would imply that their lack of participation is partly linked to faulty behaviour on the part of the audience. From this critical observation, Nottingham Contemporary has developed a new set of values more in line with the perceptions and actions of the institution, symbolised by the words Brave, Hopeful, Open, and Resourceful.

The cases studied also reveal oppositions between these values of equality, diversity, and inclusion and the other values associated with cultural action. EDI values can sometimes be set against artistic or aesthetic values. In the case of PELE, the actions carried out by the institution sometimes have difficulty in being recognised as legitimate by canonical actors in the cultural field whose actions are mainly oriented towards artistic and aesthetic values.

In the case of Gasworks, the question arises as to whether these values can be maintained in the context of an economic crisis. Although the institution does not perceive these values as imposed constraints, it may perceive tensions between these values and the evaluation of the intrinsic quality of the work carried out. The cases of Mudec and the Biennale also show how these values can come into tension with the economic value associated with cultural action.

Finally, EDI values can come into conflict with the way in which public authorities interpret the issues to which the institutions are committed. The case of the RGYCC in Hungary shows that these issues are sometimes perceived in social and economic terms rather than in cultural terms. In this case study, both the State and the municipality of Budapest perceive the mission of the centre and the MSG as one of redistribution aimed at combating poverty. The cultural interpretation of the integration of Roma populations is sidelined here.

3. EDI values and their impact on the internal organisation of institutions

EDI values have a different impact on the internal organisation of the institutions studied. Our analysis reveals two cases in point. The first is that of institutions for which these values have an impact on internal governance. Within the sample of institutions studied, the typical cases are Gasworks, Nottingham Contemporary, PELE, and Sonoscopia. The two British cases are undoubtedly the most illustrative of this scenario insofar as they both demonstrate an explicit

affirmation of the integration of EDI values within the internal organisation of the institutions, as well as the implementation of significant changes in terms of governance following this integration.

Gasworks has thus developed a code of conduct and organisational principles affecting internal relations within the institution, both between staff members and their collaborators and between artists invited for residencies. These documents, which address the EDI values as well as a number of related values, such as anti-racism and concern for the environment, are formalised, revised annually, and published on the institution's website.

In the case of Nottingham Contemporary, the internal reflection on the values has led the members of the institution to review the modes of internal governance by adapting them more explicitly to the EDI values. Here again, this effort is clearly formulated and formalised, notably in the latest application for NPO status that the institution submitted to the Arts Council, in which it stipulates that by 2026 '25% of the Nottingham Contemporary staff and audiences will be ethnically diverse, 20% disabled and 30% from lower socioeconomic groups.' The transformation of forms of internal governance also involves the adoption of a new recruitment system that takes greater account of exchanges between applicants and staff. More generally, the integration of EDI values has prompted reflection on the status expected of an institution like Nottingham Contemporary and on the image of verticality and infallibility generally associated with large-scale facilities.

In the case of PELE and Sonoscapia, the impact of EDI values is essentially reflected in participative, horizontal forms of organisation. EDI values are not formalised in the documents governing internal governance.

The second scenario concerns the other institutions where EDI values do not significantly affect internal governance. For these institutions, the values are mainly reflected externally in the actions taken with audiences and artists.

4. Strategies for implementing values through action

The strategies developed by the institutions studied appear to depend on the criteria adopted to define the values. Four common features can characterise these action strategies. Firstly, they almost all have a territorial dimension in that they are deployed within the territories in which the various institutions are based. Secondly, they all include an educational dimension, even when this is coupled with an entertainment dimension for commercial purposes. Thirdly, they all, or almost all, include a participatory dimension aimed at bringing together artists or target audiences within the creative process. Finally, they are all based on strategies of collaboration with other actors in the areas in which the institutions operate, whether these be other associations - in the case of PELE, Sonoscapia, RGYCC, and Glove Factory – artists, academics – Mudec, Austrian pavilion – or local businesses – in the case of the NCT and Nottingham Contemporary partnership.

More specific strategies are sometimes implemented. Some institutions are proposing initiatives that are close to the concept of 'third places.' In Hungary, Glove Factory could itself be described as a third place insofar as the institution offers an Open House concept: the centre is open to visitors all day, and they can use some of its facilities freely, with no obligation to take part in the activities offered by the staff. In the UK, Nottingham Contemporary is implementing a similar

type of strategy, but on an ad hoc basis, like the Big Room Family Films initiative.

Another specificity concerns the sometimes ambiguous use of digital tools. Digital tools are used at PELE, for example, with the Cicatriz - Memories of Today initiative, an online platform for self-expression. In the case of the RGYCC in Hungary, the use of digital tools is, above all, part of a communication strategy. This strategy must be understood from two angles. On the one hand, from a traditional perspective, it serves as a vector of information for the actions carried out by the centre. On the other hand, for an institution that can be seen as marginalised in many respects, it represents a strategy for opening up both territorially - by reaching out to people outside the neighbourhood - and culturally or politically - by reaching out to allies outside the Roma community. However, the use of digital tools can be contradictory, as shown by the example of the Nottingham Contemporary: the use of digital forms of advertising can be ineffective in reaching the most vulnerable populations.

There are two significant problems in implementing these initiatives. The first is the economic and material cost of these initiatives – a cost that is all the greater given that many of the institutions analysed operate on modest budgets and rely on volunteers. The second is the diversity of the areas targeted, which requires institutions to be highly adaptable. More generally, the implementation of actions associated with EDI values requires a high degree of malleability and the ability to question the intrinsic complexity of this set of values and the plurality of definitions that may be associated with it.

2. How does evaluation affect the action of cultural institutions?

In light of the previous developments, it is clear that the impact of actions taken in terms of EDI values can be just as diverse and complex as it is difficult to assess. In this report, we asked ourselves how the institutions studied viewed the impact of their actions and what forms of evaluation they were developing to support this view. In this second section, we will begin by highlighting the diversity of the forms of evaluation used by the institutions before looking at the tensions and contradictions associated with the evaluation process.

2.1. How institutions evaluate the impact of their actions

Here again, our analysis enables us to highlight the diversity of the forms of evaluation used by the institutions in our sample. Four lines of opposition will allow us to identify typical models of evaluation implemented by European cultural institutions.

The first is the opposition between ex-ante and ex-post evaluation. Less common than the second, the first form of evaluation is often directed outwards when the institution has to select projects to support, as is the case with the Biennial. The ex-ante evaluation is also often informal and consists of integrating the expectations of the funder with a view to obtaining funding. In this way, the two Hungarian institutions define the scope of their activities upstream in order to comply with the demands imposed by the municipality. An initial contradiction arises here in that the objectives defined upstream are unequally assessed subsequently according to their initial degree of importance. For example, in the case of Glove Factory, the institution defined

two levels of action upstream: a first objective for the Magdolna, Orczy, and Csarnok neighbourhood and residents of other areas in the 8th district and a second objective for residents of different communities and professionals. However, only the information relating to the first objective is retained in fine.

The forms of ex-post evaluation can themselves be divided into different categories. A second line of opposition concerns evaluation carried out internally and evaluation delegated to one or more external bodies. Of the cases observed, only two demonstrate the effective use of external evaluation. The first is PELE, which uses both academic and specialist evaluation institutes. The second case is that of Gasworks, which reflects a specific situation which could be described as the internalisation of external assessment and which we described as a co-created evaluation process in our analysis report. This is the Participatory Advisory Board at Gasworks, which is made up of people from outside the organisation, including representatives of local partners, former participants in activities organised by the institution, and a mental health advisor. Its main aim is to provide input into the Participation Programme and provide feedback on the actions taken. All Board members are compensated, at least in the form of reimbursement of expenses.

There are two main types of internal evaluation. The first is the distinction between formal and informal evaluation methods. By traditional methods of assessment, we mean systems that have been the subject of explicitly expressed and formalised approaches and strategies, the results of which are kept in the form of reports or activity reviews. Although all the institutions studied have formal evaluation procedures, these are, with a few exceptions, limited and largely exist at the behest of the funder(s). This is the case, for example, with the local council for the two Hungarian institutions studied and with Arts Council England for Gasworks and Nottingham Contemporary.

The second divide is between quantitative and qualitative modes of evaluation. This divide only overlaps imperfectly with the previous one insofar as qualitative processes can be highly formalised, as in the case of the Gasworks' Advisory Board. Conversely, most of the institutions studied are developing a form of evaluation based on quantitative criteria without these being clearly formalised.

2.2 Tensions from evaluation systems

Several tensions or constraints relating to evaluation emerge from our case studies. The first relates to the use of external evaluation. The fact that this is still very much in the minority among the cases studied is primarily because it represents a significant financial constraint, all the more so for small or medium-sized institutions, as shown by Nottingham Contemporary's reluctance to have recourse to a university evaluation due to the cost. Another pitfall that limits the use of external evaluation is the mismatch between the needs expressed by institutions and the solutions proposed by external evaluators. The example of PELE shows that the methods offered by external evaluators, whether from the academic world or the private sector, are all too rarely in line with the institutions' expectations. In addition, there are misunderstandings due to differences in language between the institutions and the evaluators. Finally, budgetary problems and staff turnover within the evaluation bodies sometimes prevent stable long-term monitoring of the actions undertaken.

Faced with these pitfalls, the institutions studied propose two types of solutions. The first, which

we have already mentioned, is to internalise the use of external evaluators. Like Gasworks, this involves inviting people from outside the organisation to express their views and make recommendations to an internal body. Nottingham Contemporary also appears to be moving in this direction. The other solution proposed by PELE is to integrate broader and more diverse evaluation capacities within the organisation itself by entrusting the monitoring of the evaluation to a member of the structure who will be able to understand the project in detail and respond to the need for continuity expressed internally. This solution does, however, reveal a pitfall common to many organisations, namely a lack of resources and a lack of training for teams in evaluation.

While they agree on the need to evaluate their actions and their impact, most of the institutions studied are critical of the evaluation grids imposed on them by their funders. These criticisms relate firstly to the lack of flexibility of these grids, which are often poorly adapted to the specific characteristics of each organisation. They also relate to the quantitative nature of the indicators imposed, which again only imperfectly reflect the impact that these institutions can have within their environments. This is why most of them express a need for the criteria imposed to include a qualitative dimension to a greater extent.

The rigidity of the evaluation grids set by funders is detrimental to the institutions in three ways. Firstly, it can be particularly time-consuming, which can be to the detriment of the actual artistic work and, somewhat contradictorily, the impact that these institutions are supposed to produce. Secondly, it can be perceived as a mere administrative constraint and push institutions to value informal evaluation methods even more, which can be detrimental to the visibility and legitimacy of the work carried out by cultural institutions. Thirdly, the development of these informal evaluation methods makes it difficult to make comparisons and hampers the establishment of a global and realistic vision of the work carried out by the institutions. Added to this is the fact that these evaluation grids are sometimes unstable and change with changes in political majorities, which further hampers the study of the real impact of the work of cultural institutions.

3. Conclusion – Insights from comparison

The case studies allow us, first of all, to highlight a number of factors relating to the integration and evaluation of EDI values. While these values permeate all the institutions studied, which testifies to a widespread movement in Europe, the case analyses show the impact of the national institutional context. This impact is evident in the case of British institutions, where the influence of Arts Council England is perceptible. This result relates to the conclusions presented in deliverable D4.3, where we show that the integration of the plurality of values associated with culture was more recent and more explicit within states characterised by a model of cultural action described by Chartrand and McCaughey (1989) as a patron state. This also relates to the work achieved in D1.4 on neoliberalism, as the influence of a marketised approach is clearly visible in the British case (Alexander & Peterson Gilbert, 2023).

Other essential elements emerge from this analysis, such as the integration of institutions within extended networks, which, on the one hand, facilitates the concrete integration of values within the actions carried out and, on the other, facilitates the development of modes of evaluation built around these values. The public/private opposition, as it appears in the Italian cases, is also

relevant to understanding the differences in the definitions of EDI values. Finally, this analysis seems to underline the advantage enjoyed by small and medium-sized institutions due to the flexibility of their structure, which no doubt explains the inventiveness they demonstrate, in contrast to the relative rigidity of the Biennial or the large-scale facilities mentioned in deliverable D4.3.

In light of the constraints identified, our study finally enables us to highlight a number of lessons relating to the promotion of EDI values and their evaluation in European cultural institutions. The first of these lessons is that it is essential to define upstream the interest linked to the promotion of these values beyond the rhetorical and communicational arguments. Secondly, it is necessary to establish a clear definition of these values, ideally in cooperation with the institutions themselves or their representatives.

From the point of view of evaluation, our analysis also highlights the need to establish schemes that are negotiated or co-constructed with the institutions so that they can be directly operationalised in the field. From this point of view, our work argues against a 'one-size-fits-all' approach, which involves incorporating non-metric categories of evaluation to capture fully the work and impact of different sized and oriented organisations for a range of time horizons. We also recommend supporting organisations' efforts toward the creation of their internal systems of evaluation, including co-created evaluation involving (potential) audiences. This generates connections to communities and new ideas.

Our results suggest the importance of encouraging (or even funding) evaluation partnerships with external allies to develop more 'conversational' and 'reflective' systems of evaluation. This generates richer data and new ideas. Promoting the training of teams in evaluation techniques seems to be another fundamental issue for future European cultural policies. The implementation of appropriate evaluation methods is one of the conditions for highlighting and legitimising the work carried out by cultural institutions in Europe.

List of abbreviations

GFCC Glove Factory Community Centre (Kesztyűgyár Közösségi Ház)

IUDS Integrated Urban Development Strategy (Integrált Város-/Településfejlesztési Stratégia)

JKN Nonprofit corporation “For the Communities of Józsefváros” (Józsefváros Közösségeiért Nonprofit Zrt.)

KSH Hungarian Central Statistical Office (Központi Statisztikai Hivatal)

LEOP Local Equal Opportunities Programme (Helyi Esélyegyenlőségi Program)

MSG Minority/Nationality Self-Government (Nemzetiségi Önkormányzat)

MQP Magdolna Quarter Programme (Magdolna Negyed Program)

RGYCC Rácz Gyöngyi Community Centre (Rácz Gyöngyi Közösségi Ház)

UDC Urban Development Concept (Településfejlesztési Konceptió)

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Gábor Erőss, Deputy Mayor for Culture, Municipality of 8th District on 15 May 2023

Zita Csőke, Director of JKN Community Directorate, Professional Director of Glove Factory Community Centre on 1 June 2023.

Case 5 - PELE

Maria João Mota (Coordination and Artistic Direction) and Lucelina Rosa (*Urgent Youth* Coordination) on 22 March 2023

Focus group with members of the PELE team - Maria João Mota (Coordination and Artistic Direction), Lucelina Rosa (*Urgent Youth* Coordination) and Janne Schröder (Artistic Team) - and members of the MEXE Association team - Inês Luzio and João Miguel Ferreira on 5 June 2023

Case 6 – Sonoscopia

Patrícia Caveiro (Management, Production and Public Mediation) on 27 March 2023

Patrícia Caveiro (Management, Production and Public Mediation) on 30 May 2023

Case 7 – Gasworks

Alessio Antonioli, (outgoing) Director (12/06/2023)

Laura Hensser, Managing Director (12/06/2023)

Rosa Tyhurst, Curator (22/06/ 2023)

Javiera Sandoval Limari, Coordinator of the Participation Programme and Member of Gasworks' Advisory Board (22/06/ 2023)

Case 8 – Nottingham Contemporary

Salma Tuqan, Director (19/07/2023)

Amanda Spruyt, Head of Learning (14/07/2023)

Andy Batson, Head of Marketing & Visitor Experience (1/08/2023)

Sam Harrison, Visitor Services Supervisor (1/08/2023)

Charlotte Tupper, Nottingham Contemporary Associated Artist (15/08/2023)

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